

UNITED STATES OF AMERICA
GENERAL SERVICES ADMINISTRATION

THE BUILDING MAINTENANCE AND OPERATIONS (BMO)
INDUSTRY DAY

Kansas City, Missouri
Tuesday, February 2, 2016

1 P R O C E E D I N G S

2 (9:00 a.m.)

3 MS. SNODDERLY: Good morning and welcome
4 to the BMO Industry Day here in Kansas City. This
5 is city No. 4 for us doing these Industry Days,
6 but we're excited because this is home for us. We
7 actually got to sleep in our own beds last night,
8 got to get up and come in, so we're excited about
9 that.

10 My name is Mary Snodderly. I'm going to
11 be your facilitator today, throughout the day and
12 I just have a couple housekeeping remarks before
13 we get started. First of all, phones, please put
14 them on silent, vibrate, whatever. If you need to
15 take a phone call, feel free to step outside so
16 you don't disturb other people listening to the
17 presentation.

18 Restroom, if you go out this back door
19 on your left, my right, and go down the hallway
20 the restrooms are right -- should be right there.
21 I believe both the men and women's restroom are
22 right there.

1 Unfortunately, there's no cafeteria in
2 the building. However, if you want a soda -- I
3 don't think there is any coffee. If you want
4 sodas, go out that same door, go down the hallway
5 and kind of right behind where the screen is,
6 there's a break room that has soda machines and
7 snack machines.

8 If you're in from out of town, hopefully
9 you will find there are places you can have lunch
10 afterwards that aren't too far from here. And I
11 believe if you go out there's an information desk
12 out by where you came in and they will give you a
13 map.

14 Okay. I also want to let you know we do
15 have a court reporter who is going to be
16 transcribing this event for us. We've had them at
17 our other three and we will have it all of this.
18 What happens when she transcribes and we get the
19 notes from the meeting, we will be posting it to
20 our BMO interact page. I know you're next
21 question, what's the BMO interact page? If you'll
22 bear with us we will give you the website as we go

1 through the presentation. I think it is towards
2 the end, but we will definitely give that
3 information to you.

4 Now as you came in we checked you off
5 your registration. If you had preregistered you
6 should have been on our list. If not, hopefully
7 we got your information. What we are going to do
8 is share your contact information. What we have
9 heard particularly when we did our Zone 1 is that
10 people wanted to network. As you understand and
11 as we go through this, you will see there are
12 required services. If your company does not offer
13 all the required services, you may need to network
14 and partner with some other companies to provide
15 those required services. And don't worry, we're
16 going to go through what that all is as we go
17 through this this morning. So if you do not want
18 your company's contact information shared, let us
19 know and we will mark it down and not share that
20 information. But then you're not going to get the
21 contact list either, so please know that. For any
22 government people, we're not going to share

1 government contact information.

2 Let's see, I think that is all I have on
3 my list as far as any housekeeping items. So
4 let's just kind of take a quick look at the agenda
5 before I introduce Teresa. We've kind of gone
6 through the welcome. Teresa is going to give us
7 some opening comments. I'm going to give you an
8 overview of Category Management. Category
9 Management is kind of the overarching --
10 overarching area for strategic sourcing and BMO.
11 And then I'm going to talk about BMO and how it
12 fits into the Category Management. Janet is going
13 to get up and talk about the acquisition solution
14 and I know that's probably why everybody is here.
15 She's actually going to go through section by
16 section on the draft RFP. Then we will talk about
17 some next steps, what's going to happen, and then
18 I will give you an introduction to what is called
19 the Acquisition Gateway, which is part of Category
20 Management as well. And then we will open it up
21 for questions and answers. We do ask that you
22 hold all your questions until we get to the

1 question and answer part of it. Again, that is
2 going to help with the court reporter and that way
3 we don't get stuck in one particular area. We can
4 get through the material and we have allowed
5 plenty of time for questions and answers. We are
6 here until noon and I think most of our others
7 have been getting over at 11:30, 11:45, and that's
8 with the questions and answers.

9 So with that said, I would like to
10 introduce Teresa McCarthy. Teresa is the Director
11 of Integrated Facilities Management and Industrial
12 Products Solution Center. I have to look at her.
13 That's a long name. So Teresa.

14 MS. MCCARTHY: I'm just going to walk
15 around here. Can you hear me in the back? Okay.
16 Good. I'm the Director, and we like to call it
17 DIFM because it took me about three days to get
18 that under my belt and it's even hard for me, but
19 it's a hard set of words put together for a big
20 name. But what I want to do is welcome you here
21 today, welcome to Kansas City for many of you.
22 The weather is not real good, but it's better than

1 it could have been. We were expected to have
2 about ten inches of snow and we are very grateful
3 we don't have that. Some of you in the audience I
4 recognize from other Industry Days, so thanks for
5 coming again.

6 We're here to discuss BMO. This
7 initiative is something that I'm so excited about.
8 There's a lot of opportunities here, but we need
9 your help. We need your help to help us make sure
10 that we draft the best statement of work that we
11 can. And how do we do that? We will get into
12 that a little later, but there is right now a
13 request for proposal on the street and it's a
14 draft. It's a draft of what we're aiming to do,
15 is get your responses from that draft, and that's
16 primarily one of the reasons we're having this
17 Industry Day today is to expose you to that RFP,
18 so we can go ahead and have an exchange of
19 questions and answers and some of them we will
20 answer for you and some we'll have to get back to
21 you on, but we will have these as Mary said
22 posted, all the questions and answers will be

1 posted as we have done. This is our fourth event
2 that we've done. We've been to San Francisco,
3 Atlanta. Where else --- Fort Worth, I forgot
4 where we went. And then we're going to head to
5 Boston at the end of February. We were delayed
6 going to Boston. They had a real live snowstorm
7 and we couldn't get out of Kansas City. There
8 were too many flights that had been rescheduled.

9 But this initiative is one that is going
10 to really depend on our help that we get from --
11 how efficiently we're going to be and what kind of
12 service that we can best offer to the customer. I
13 know that there are live demands for these
14 services. I was with GSA for awhile early on in
15 my civilian career. I've been with DOD for quite
16 awhile and I know that there's a big need for this
17 on every base and installation. The reserve
18 center, National Guard, and I mean there's so many
19 other places where this type of service is
20 required and it's a repetitive service. It's done
21 every year. We got to keep the bases and
22 installations running.

1 We got several things we're going to
2 talk to you about today and, again, we need you to
3 provide the services. We need to give the
4 taxpayers a good service as well but we also need
5 to take care of our vendors. We need to make it
6 something that you're going to be able to support
7 with your company and make it profitable and good.
8 So with that I'm going to introduce you to our
9 staff. Mary Snodderly who is Program Manager. We
10 also have Janet Schweer who is a Contracting
11 Officer for the program. Patrick Mazzei who is
12 another Contracting Officer for the program and
13 they both will help to brief today and answer
14 questions. And then we have a representative from
15 the Small Business, Ms. Amy Lara and she's here
16 and on your break time if you are a small business
17 and you have some questions about partnering that
18 she can help answer that or direct you to the
19 right person if she doesn't have the answer. I'm
20 sure she can direct you to the right person that
21 does. So with that, I don't want to delay, but
22 I'm just so excited to have you here and to come

1 up with us for a good product in these zones.

2 On the BMO for Zone 1, we are currently
3 in source selection. With that type of a
4 procurement it has to go through several layers
5 above us to get approval for the awards. So that
6 is why it's taken us a little bit longer. You
7 should hopefully see something around the
8 beginning of March. Unfortunately, it's got to go
9 that long, but we have several we had to go
10 through and make sure we have a good award that's
11 good for you and good for the customer. So with
12 that I'm going to turn this over to Mary, who is
13 going to talk to you about Category Management.

14 MS. SNODDERLY: Thanks, Teresa. Also,
15 to let you know we have two other team members
16 that are not with us. They are back in the office
17 diligently working on the Zone 1 awards, Josilyn
18 Reed and Katie Hutton. In fact, this is the first
19 one Patrick has been able to join us on mainly
20 because we're local here, but there's just a lot
21 of work going into getting that Zone 1 awarded, so
22 the Contracting Officers have really had to stay

1 back and work on that.

2 I did forget a couple things on the
3 housekeeping. If you look on where you're
4 sitting, there are some black boxes. If you push
5 those down they will pop up and they're
6 electrical. So if you need to plug in anything
7 you got electrical. I think if you push it down
8 or lift it up maybe. There you go. Okay. Then
9 what you also see on the table it looks like
10 something that goes with a speaker phone, those
11 are microphones. So when we get to the question
12 and answer part of it we're going to ask you, you
13 got to hold it down and you will see a green light
14 come on and hold and speak into that so that we
15 can get information as we to through. We do have
16 a smaller crowd, so maybe we don't need the
17 microphone so much. We will have to see how that
18 goes. Okay.

19 Let's talk a little about Category
20 Management and what this is all about. Like I
21 said this is kind of the overarching area for BMO
22 strategic sourcing and so forth. But first of

1 all, let's kind of a take moment and define
2 Category Management. It is a strategic and
3 systematic approach to purchasing that is widely
4 used in the private sector. So many of your
5 companies may be using a Category Management
6 approach. The government is just kind of moving
7 into that area. Now Category Management focuses
8 on and around defining and organizing products and
9 services that behave in a similar manner of
10 logical groupings and then managing those
11 categories as strategic business units. So we are
12 really into implementing Category Management
13 within the federal government so that we can buy
14 smarter and act like a single enterprise rather
15 than this agency doing something and this agency
16 doing something and this agency doing something,
17 that way we can kind of focus.

18 Now what does this actually mean? The
19 Category Management Leadership Counsel is the
20 governing body for Category Management. It is
21 made up of the seven high spend agencies within
22 the federal government. GSA is part of that.

1 It's actually led by OMB. Office of Federal
2 Procurement Policy chairs Category Management, so
3 CMLC. You know, in the government we have to have
4 acronyms, so we call it the CMLC. As we go
5 through we are going to try to define our
6 acronyms. So if we skip something and accidentally
7 use it, waive your hand and we'll know we got to
8 go back and define it. CMLC or Category
9 Management Leadership Counsel, it was formally
10 known as the Strategic Sourcing Leadership Counsel
11 or SSLC, which focused mainly on federal strategic
12 sourcing. Now, again, they're looking at the
13 broader picture and focusing on Category
14 Management. Strategic sourcing is a part of
15 category management. So it's one piece of it and
16 then BMO fits into that. Okay.

17 The CMLC actually did define seven goals
18 for government wide Category Management. These
19 include increasing our spend under management. It
20 includes reducing contract duplication. Again,
21 that kind of goes back to us acting as one
22 enterprise versus this agency doing this and this

1 agency doing this, we can eliminate some of that
2 contract duplication. Generate volume savings.
3 Again, by acting as one enterprise we feel like we
4 can, you know, put some of the buying power
5 together and it makes it easier on the industry as
6 well as the government. Achieve administrative
7 savings, enhancing data transparency, boosting
8 innovation, that's one thing we heard as well
9 particularly from industry. The way the
10 government use to buy kind of stated that way, it
11 prohibited -- some of the things were so complex
12 and with the repetitive it inhibited actual
13 innovation, so with Category Management one of the
14 goals is to boost innovation. And then increase
15 efficiency and effectiveness.

16 Now what does this specifically mean for
17 industry? We have some information up here. We
18 want to improve relationships. We know if we have
19 a good relationship with industry as we go
20 forward, that helps us give a good product. I see
21 people taking screen shots of the screens, you're
22 welcome to do that, but we will be posting these

1 slides on the BMO interact page as well, so you
2 will have a copy, actual copy of the presentation.
3 But, again, you're welcome to take them if you
4 want to take the screen shots as we go forward
5 here.

6 Okay. So, again, getting back to
7 industry, improved relationships, reduced
8 complexity. I just spoke a minute ago and talked
9 about how complex it is and hopefully with the
10 Category Management we can reduce that complexity.
11 Improved performance, increased innovation, talked
12 a little bit about that already, and then reduce
13 costs to our industry partners. By reducing your
14 costs obviously that helps the government as well
15 and it's a win-win for everybody.

16 That's Category Management in a
17 nutshell. And some of you, like I said, you may
18 be implementing this in your own company and maybe
19 talk about it more than I can. But the government
20 is really starting to get into Category
21 Management.

22 So with that said, let's talk a little

1 bit about BMO specifically. What is BMO? BMO is
2 Building Maintenance & Operations. It's services.
3 So what happens -- where did we start with BMO?
4 It started under strategic sourcing, a strategic
5 sourcing initiative. Again, we developed an
6 interagency commodity team. This started about
7 three years ago. We went down the path and looked
8 at best practices. That was kind of our first
9 initiative around BMO and then for the last
10 year-and-a-half to two years, we've been working
11 on the acquisition piece of it. Now you can see
12 the list of agencies up here and we have about 18
13 different agencies and organizations that are part
14 of that interagency commodity team. They have
15 helped to put together the strategy for BMO. We
16 have talked to them, we had meetings, we had
17 one-on-one conversations with these agencies and
18 said what specifically are you looking for?

19 Now with that said, let's talk for a
20 minute about the contract structure of BMO. It is
21 a government-wide vehicle. I want to emphasize
22 that. It is not just a GSA vehicle, it's

1 government-wide. I talked about those agencies
2 that are part of the commodity team, they helped
3 us to develop this program. It is an open market
4 multiple award IDIQ. How many people in here are
5 contract holders for Schedule 03-FAC? Do we have
6 anybody? I see several. So let me repeat that.
7 It's an open market, multiple award IDIQ, meaning
8 it is not going against that schedule. They are
9 totally two different procurements. So just
10 because we have a Schedule Contract does not give
11 you -- you don't have to have a Schedule Contract
12 to be part of the BMO and just because you have a
13 Schedule Contract does not mean that you are part
14 of BMO. So hopefully that makes sense. These are
15 two separate contract vehicles.

16 BMO uses commercial contract terms and
17 conditions or FAR 12. Janet is going to get into
18 a little bit more depth on that. Also she's going
19 to talk more on the primary NAICS Code. The
20 primary NAICS Code that we are using is 561210.
21 Now Janet is going to talk a little bit more,
22 again about other NAICS Codes. And I'm going to

1 let Janet define that acronym, NAICS code. I
2 intend to forget that one.

3 Okay. The BMO will allow for various
4 contract or various task-order level contract
5 types, such as firm fixed price, time and
6 materials and labor hours. So just know that as
7 they come in, as the taxpayers come in, it could
8 be a different contract type.

9 Now, the BMO will be a ten year
10 contract. This is at the parent contract level.
11 That is a five year base with one five year
12 option. Now task orders, that's a whole different
13 story. According to FAR there is a five year term
14 limit on contracts with BMO type services, so at
15 the task-order level unless an agency seeks a
16 deviation to go beyond that five years. Most
17 likely there's going to be probably a one year
18 base with four one year options so they will only
19 go to five years. Now again the parent, we've
20 gotten the deviation so at the parent level we
21 will go up to ten years.

22 Okay. Agencies can order a single

1 service or multiple services. This is going to
2 make a little bit more sense when I show you a
3 chart here in a little bit that talks about the
4 services that are offered. You, as contractors,
5 have certain services that will be required. The
6 agencies do not have to order any of those
7 required services. They can order a single
8 service or a mix of multiple services. Also
9 applicable sustainable product requirements are
10 included at the parent contract level. This is
11 government-wide. Every agency may have something
12 more specific and they will include that at the
13 task-order level.

14 Okay. We've also included a unilateral
15 changes clause, we have a waiver for that, and
16 that is included in the contract. Janet is going
17 to talk more about what that is all about. And
18 then keep in mind BMO is out there and offers
19 opportunities for both large and small business
20 participation. And we're going to talk a little
21 bit about that.

22 So let's talk for a second about our

1 small business strategy. When we were looking at
2 BMO rather than do similar to the schedules or
3 similar to -- if anybody is familiar with the
4 OASIS strategic sourcing effort, we did not do a
5 nationwide or worldwide effort. We divided it up
6 into zones. And this is to hopefully enhance and
7 help small business participation as we go
8 further.

9 Subcontracting requirements. If you are
10 a large business, you will be required, and Janet
11 is going to talk about this more, you will be
12 required to do a sub-contracting plan. Now, at
13 this point we have two solicitation or two drafts
14 that are out there. One is unrestricted, the
15 other is a total small business set-aside. Within
16 the small business set-aside, customers would be
17 able to do a set-aside at the task-order level
18 that they could even go in and do -- use other
19 socio-economic categories. Let's say if there is
20 enough businesses for disabled, veterans-owned
21 businesses or a woman-owned, under the small
22 business solicitation they would be able to do a

1 set-aside there. And Janet is going to talk about
2 if you do fall into those categories how you will
3 get additional evaluation credits. You can tell
4 we've done this presentation a lot because I think
5 Janet is going to talk about this and I'm stealing
6 her thunder a little bit I'm thinking.

7 Okay. Let's talk about the scope of
8 services what this mean. You're going to this see
9 chart a couple of times. It's very important,
10 that's why we got it in here a couple times. What
11 you see up here is we have divided BMO into two
12 service groupings. One is Operations &
13 Maintenance, the second is Facility Support
14 Services.

15 Now as we go through here we may find
16 that in certain zones maybe we only have one
17 category versus the two separate categories.
18 Again, that's market research and this is where we
19 need your feedback. You heard Teresa say at the
20 beginning this is an exchange, we need your
21 feedback to this information. Okay.

22 Within those two service groupings we

1 also have certain required services. You can see
2 up here on the chart for instance operations and
3 maintenance, you have required services of HVAC
4 maintenance, plumbing and pipefitting, electrical
5 maintenance, elevator maintenance. Now elevator
6 maintenance is not a required service under the
7 small business set-aside, it is an optional
8 service. And then you see a whole host of
9 optional services listed there as well. And you
10 do get extra evaluation credit if you offer those
11 optional services.

12 Okay. Zones, and I know I had some
13 conversation at the beginning where we talked a
14 little bit about the zones. Zone 1, which
15 encompasses Washington, DC, and seven surrounding
16 states Virginia, Maryland, Pennsylvania, Delaware,
17 New York, New Jersey and West Virginia. That is
18 Zone 1, that's what we're in the process of
19 awarding. We are going through the award process
20 now. We can't really say much about it because
21 we're in the middle of the award.

22 What we're doing here is talking about

1 adding five additional zones. Zone 2, which
2 includes Massachusetts, Connecticut, New
3 Hampshire, Vermont, Maine, and Rhode Island. Zone
4 3 which is Florida, Georgia, North Carolina and
5 South Carolina. Zone 4, which is Texas and
6 Oklahoma. Zone 5, California and Nevada, and last
7 but not least Zone 6, which is what you are in
8 here which includes Missouri, Illinois, Iowa,
9 Nebraska and Kansas. Now that doesn't mean that
10 we won't cover some of the other areas. Again, we
11 broke these down one, based on spend and you do
12 see spend numbers up there, that's FY14 data, and
13 that came from FPDS-NG. So we look at what total
14 spend for BMO type services were and then we also
15 look at actual landmass, you know, again to ensure
16 small business participation. But this is
17 something that we would like your feedback on.
18 Are these zones too big? Are these zones too
19 small? Give us some information on what you feel
20 like -- what your business can actually cover.

21 I think I went through that pretty
22 quickly. Janet, hopefully I didn't leave anything

1 out there. At this point I'm going to introduce
2 Janet. She's going to go through the draft RFP.
3 And not quite in the middle of the slides, but
4 kind of in the middle of the bulk of the
5 presentation we will take a break and let you kind
6 of get up and talk among yourselves. And, again,
7 please hold your questions until the end, you
8 know, if you need to jot them down so you remember
9 what you want answered. So Janet?

10 MS. SCHWEER: Good morning. This part
11 of the presentation is long so forgive me if I sit
12 on the stool for parts of it. We're going to get
13 right to -- can you hear me okay? Acquisition
14 Solution. I'm going to go through each part of
15 it. We're going to talk about the draft that's
16 out, the questionnaire that's out, and I'll try to
17 give you some tips for some of the sections as we
18 go along and go through this.

19 So right now as Mary mentioned we have
20 two draft documents out, we have the Draft
21 Unrestricted Request For Proposal and the Draft
22 Small Business Request for Proposal. We have

1 posted them right now for all the zones, so
2 there's one for Zones 2 through 6. We are
3 anticipating having separate ones, separate
4 documents for each zone when we post the final,
5 but right now we're not sure if they'll change
6 those as Mary said, but that depends on the
7 feedback we get from the industry. We posted
8 those January 8th and January 11th perspectivevely.
9 The closing dates -- we'll the closing date of
10 February 5th, we're going to extend it to February
11 26th. Originally we had, as Mary mentioned, we
12 had to move our Boston event due to the weather so
13 we have now pushed it back until after the Boston
14 event. So the closing date for both is February
15 26th to get your questions into us and then it
16 also includes a questionnaire separate from the
17 actual draft document that is posted with it that
18 we would like everybody to fill out. It kind of
19 gives us an idea of your company's capabilities in
20 all the states and what services you can offer in
21 those states. As Mary just mentioned it's very
22 helpful for us, not only in deciding if those are

1 too big or too small, but what our featured zone
2 looks like as well.

3 We are projecting right now that our
4 final document will be released in late May, early
5 June 2016.

6 Okay. So Section A of the draft
7 document is reserved for Standard Form 33. I'm
8 not going to go through all the presentation, but
9 just a short word of advice, make sure you read
10 the instructions for the Standard Form. I know
11 it's easy to kind of go through and put in your
12 company's name, your address, blaugh, blaugh,
13 blaugh, blaugh. Make sure you're reading the
14 instructions for the solicitation when filling out
15 those documents. Make sure you're getting all the
16 blocks that we ask you to fill out.

17 Section B as Mary mentioned, the
18 contract type, a government-wide multiple award,
19 indefinite delivery, indefinite quantity contract
20 or an MA-IDIQ. For those of you who have had a
21 schedule contract that is also a multiple award
22 IDIQ. It's the same contract type. This will

1 allow for various contract types at the task-order
2 level, fixed-price, time and materials and labor
3 hour. Utilizes commercial contract terms and
4 conditions, which is why you don't see cost
5 reimbursement up there because when using
6 commercial terms you're not allowed to use cost
7 reimbursement as a contract type.

8 The minimum guarantee will be \$2500.
9 All IDIQ contracts have to have minimum guarantee
10 to the vendor and that will be 2500. What we will
11 be offering up right now is the maximum because we
12 haven't a program and so that will probably vary
13 by zone. I can tell you Zone 1 is 15 million, so,
14 you know, a great maximum to have there.
15 Hopefully, we'll get there, but we don't know what
16 that will be until we post the final documents.

17 Okay. The labor categories and standard
18 occupational classifications. This might be
19 something that's new to you all, not something you
20 will see on a schedule. What we've done, is we
21 have standardized labor category descriptions that
22 will be used in the contracts. So the minimum

1 education and experience requirements for all the
2 labor categories, we have determined what those
3 are based on the Standard Occupational
4 Classification System and I think the Bureau of
5 Labor as well.

6 The reason for that is to help us
7 compare apples to apples. It's really difficult
8 sometimes if we have a HVAC Technician II with
9 this company and HVAC Technician II with this
10 company, but the first company requires six years
11 experience and the second company requires three
12 years experience. Then there's a difference in
13 prices and it's hard for us to compare, well, HVAC
14 Technician II this company's price is a lot
15 higher, but they require more experience. It's
16 making it a lot easier for us and makes it a lot
17 easier for the customers. It's something they've
18 asked for before. So you'll have to take a look
19 at your labor categories for your company and
20 compare them to what we have in the draft document
21 that is posted on FBO right now and you will have
22 to kind of see where it matches up. You are not

1 required to bid on all the labor categories that
2 we have listed in there. You still only bid on
3 whatever labor categories your company offers, but
4 we have standardized that description.

5 Okay. Section C getting into the
6 Statement of Work. As Mary mentioned our
7 background here is comprehensive solution crossing
8 multiple service categories that can be sought as
9 a single/multiple service.

10 How we developed kind of the required --
11 the list of required services is with the help of
12 our commodity team, as Mary mentioned. The
13 Interagency Commodity team consists of different
14 federal agencies. They help us kind of determine
15 what are the services they most specifically order
16 together. So that's where the required services
17 came together for both the operation of
18 maintenance and facilities. Because when we get a
19 big order, we group those together and that's what
20 we want to see. They have to meet our
21 requirements to be able to reduce the number of
22 contracts that we're issuing. Overall that's what

1 we'd like to see all the vendors be able to offer.
2 So that's where -- we already generated a contract
3 with optional services and that's where required
4 services came from.

5 Period of Performance, it's a ten-year
6 term. Mary mentioned it will be a five year base
7 and one five year option and we'll talk about the
8 requirements for getting an option exercised a
9 little bit later. Again, the scope covers most
10 commonly used services and, again, we talked about
11 our geographic coverage up there. Those are
12 proposed zones as Mary mentioned. Depending on
13 the feedback we get as a response to the draft
14 documents, those may change. They may get bigger
15 or smaller and it will also help us formulate the
16 zones, the future zones for Phase 3 I guess would
17 be.

18 Okay. Performance Objectives. And you
19 saw on the chart a few minutes ago and you're
20 going to see it again, we have two separate
21 service groups, Operations and Maintenance, which
22 is O&M, and Facility Support Services. Each group

1 has services that are required and services that
2 are optional. So we don't use terms like pools,
3 which you might see like OASIS that Mary mentioned
4 or some others or we don't use special item
5 numbers from schedules. We have service groups
6 and then within those we have service categories.

7 Here's the chart again. Mary warned you
8 that you would see it a couple of times. So our
9 service categories are individual services you see
10 listed there. The blue, the Operation and
11 Maintenance and Facility Support Services and
12 other service groups. So when we're talking about
13 required, those in the required services
14 categories, if you have to offer HVAC maintenance.
15 And then elevator maintenance is an optional
16 service under the small business set-aside.
17 You'll notice toward the bottom on the Operations
18 and Maintenance side, you will see the Facility
19 Support Services as an optional service. So if
20 your company offers or can offer all of those
21 services, including the janitorial and
22 landscaping, then you can include that as an

1 optional service under the O&M. So you wouldn't
2 submit two proposals, you know, one under the
3 Facility Support Services side and one under the
4 Operation & Maintenance side, you can submit one
5 under the Operations & Maintenance. But you are
6 required to meet the same requirements in terms of
7 janitorial and landscaping. In other words, you
8 can't just offer pest control is an optional
9 service on the O&M side, you have to meet the same
10 requirements.

11 Okay. One of the differences in this
12 vehicle schedule is direct costs. A lot of you
13 are scheduled holders and you know that it is a
14 challenge with other direct costs. That vehicle
15 we tried to make that a little bit more flexible
16 with this one. Other direct costs are relating to
17 incidental services and/or supplies that do not
18 fall within the scope of any other service
19 category listed. Because what we determined in
20 our market research regarding the commodity team
21 we were at the threshold for what other direct
22 costs purchasing did vary widely by agencies.

1 Some agencies might be \$2000 and another agency
2 might be \$10,000, so we're leaving that up to the
3 Ordering Contracting Officer at the task-order
4 level. So they can set that task-order level in
5 accordance with various order agencies policies.

6 Okay. The following services are not
7 within the scope BMO. This list is from Zone 1,
8 same list that's in the Zone 1 solicitation. We
9 got feedback when we did the Industry Days in Zone
10 1. We got feedback from our commodity team to
11 formulate this list. If you all have feedback on
12 it, please send it in to us. I can tell you that
13 A/E services is not included and you're not going
14 to change our mind on those. Those definitely
15 always can be added to the scope. And the rest
16 you probably have that. These are considered
17 generally not within scope. But if you have
18 questions on it or suggestions for other things
19 that should be on there, please let us know.

20 Okay. Section D, Packing and Marking,
21 conform to commercial standards. If the ordering
22 agency has specific requirements they can add

1 those at the task-order level.

2 Section E, Inspection and Acceptance,
3 the standard FAR clause. Additional language can
4 be added at the task-order level. I know we're
5 saying that a lot, additional language can be
6 added at the task-order level, because this is a
7 government-wide vehicle we have to be kind of the
8 bones, the general part kind of broad and at the
9 task-order level we want to make sure it's
10 possible for agencies to add what they need to use
11 it, the easiest way possible for them.

12 Section F, Deliveries of Performance.
13 Again, we have a list of our zones. What we have
14 done is that if you bid on a zone you are required
15 to show or tell us how you would deliver to all
16 the states in that zone. So if you can only
17 deliver in metro Kansas City, you're going to have
18 to tell us in your proposal how you would deliver
19 to the rest of the states in that zone if you were
20 the successful offerer on this contract. What we
21 are trying to avoid is our customers going out to
22 our vehicle and not knowing who will deliver

1 where. It makes it really challenging for them
2 when they're trying to figure out if there's
3 enough companies out there that can do the work
4 that they're looking for. So our goal is we want
5 all the contractors on the contract to be able to
6 deliver to all the states. We'll talk a little
7 bit more about how you can qualify for that in a
8 little bit. We'll talk about the project coverage
9 template in a couple more sections.

10 Period of Performance, we talked about
11 already. Five year base period from Notice to
12 Proceed with one five year option in accordance
13 with the FAR clauses that you see there. There
14 may be also a six month extension to extend the
15 term of the contract or to extend services.

16 Section G, Contract Administration. It
17 talks about the roles and responsibilities of the
18 various Contracting Officers. We have Contracting
19 Officers in our office that are managing the
20 contracts. Josilyn Reed is the Contracting
21 Officer for Zone 1. Patrick Mazzei and Katie
22 Hutton will be Contracting Officers in additional

1 zones as well. And then we have OCO's which are
2 Ordering Contracting Officers. That will be your
3 agency level task-order Contracting Officer.
4 Also, we have your COR, Contracting Officer
5 Representative to help you deal with facilities,
6 etcetera. It talks about the Contract Access Fee
7 or CAF is 2 percent. So on a schedule if you have
8 a national funding fee of .25 percent, that's a cap
9 of 2 percent. That is consistent with some of the
10 other strategic sourcing vehicles. This will be
11 proposed as a separate line item on invoice to
12 your customer. So do not include it with your
13 prices because it's a separate line item.

14 Two percent off the total fixed price or
15 estimated price. This section also talks a lot
16 about the reporting. When Mary was talking about
17 Category Management, she talked a lot about spend
18 and getting data. Data is a very, very, very
19 important part of strategic sourcing. We don't
20 have a lot of transparency right now. We don't
21 have a lot of data on how those prices are being
22 paid for services. It's a little bit easier on

1 the products side to pull information, but in FPDS
2 we didn't have a lump sum -- FPDS, I'm sorry,
3 Federal Procurement Data System, where the orders
4 we get are reported by the agency. We can see
5 total prices for contracts. We don't know the
6 prices and what that's for, we don't know the
7 labor categories. It may have been four. There's
8 really lapse of that in the federal procurement
9 system right now. One of the tendencies is to try
10 to increase that transparency for data that we'll
11 collect. And a lot of that is going to fall on
12 you as an industry. When we get orders under this
13 vehicle you will be reporting to us monthly. In
14 the draft solicitation, there's a long list of
15 some of it, what information you will be required
16 to report to us. Part of that is the data we need
17 to populate our prices paid, information. Part of
18 it is also related to risks. There's a way that
19 we can maintain this oversight and make sure the
20 vehicle is being used correctly. So the
21 information is up there. Partial list. Look at
22 the solicitation for the rest of it. That section

1 also discusses task order closeouts and the option
2 determination and who will be afforded that
3 option. Again, look at the options again and
4 those requirements.

5 Section H, Special Contract
6 Requirements. This talks about ordering
7 procedures. A little bit different than schedules
8 and maybe even some of the other contracts that
9 you have. Task orders are solicited and awarded
10 by the Ordering Contracting Officer with a
11 Delegation of Procurement. What that means is
12 they have to take roughly a two-hour training
13 class from us on how to use the contract. We will
14 give them a certificate and then they will be able
15 to use the contract. We well track that. When
16 you're reporting data to us we'll be able to look
17 and see if the Ordering Contracting Officer has a
18 Delegation of Procurement Authority.

19 If you've heard of or are familiar with
20 the GWAC, Government-wide Acquisition Contracts,
21 for IT services they also do that and so did
22 OASIS. It's a way to help the Ordering

1 Contracting Officer and help our office try to
2 reduce risks and make sure it's being used
3 properly. Obviously the ordering should be within
4 the scope Section C and all other terms and
5 conditions of the BMO contract. Identify the BMO
6 Labor Categories and Service Occupational Codes.
7 Solicited and awarded under the proper NAICS Code
8 and corresponding BMO MA-IDIQ Contract Number.
9 Comply with the ordering procedures in FAR Subpart
10 16.505. They're talking about FAR or Federal
11 Acquisition Regulation, Part 8, that applies to
12 the schedule. Ordering under this vehicle will be
13 under FAR Subpart 16, Fair Opportunity, which
14 means that any company that offers the services
15 that the customer is looking for must receive a
16 copy of this solicitation. It's not quite the
17 same as the schedule where they can send it out to
18 three that offer those services. Everybody who
19 has say, for example, fire alarm maintenance
20 services, has to be solicited from the task-order.
21 It doesn't mean you have to bid on it, the
22 Contracting Officer has to send it out to

1 everybody that has that service.

2 NAICS Code. Mary mentioned earlier the
3 NAICS Code for both of these is 561210. That size
4 standard is 38.5 million. NAICS Code stands for
5 North America Industrial Classification System.
6 These are codes that are maintained by the Census
7 Bureau. They dictate -- most of the time it's
8 dollar value, products, how many employees do you
9 have to be determined if you're large or small.
10 So 38.5 million would be, if your company is
11 averaging annual revenue over the last three years
12 has been less than 38.5 million you're considered
13 a small business bidding on our solicitation. If
14 it's over that, you are considered large. The
15 Ordering Contracting Officer has responsibility to
16 determine which predominant NAICS Code applies to
17 a specific task order. So if 561210 is Facility
18 Support Services, that broadly covers everything
19 that is in the scope for BMO. However, if your
20 Ordering Contracting Officer is looking for
21 plumbing services, there is a specific NAICS Code
22 for plumbing services and they should use that

1 NAICS Code when they are soliciting at the
2 task-order level. That will have a different size
3 standard associated with this. So this will have
4 a implications on set-asides. If they're doing a
5 set-aside for a small business they will have to
6 look at that impact on your company to determine
7 if it's large or small for that. That's why the
8 NAICS Code is one of the changes we asked for in
9 the data reporting vehicle that if the NAICS Code
10 is used for the task-order to match it up. If the
11 task order is for multiple services, the Ordering
12 Contracting Officer should use the NAICS Code for
13 which of the predominant services is being
14 provided. So if it's HVAC services, plumbing
15 services, janitorial services, whichever one has
16 the biggest part in that task order, that is the
17 NAICS Code that should be used.

18 Moving onto Section H, it discusses GSA
19 BMO web page. If you go look for it right now,
20 you will not find it. They won't put it up until
21 we have awards. So that will be coming -- we will
22 promote that on our Internet site when it's up,

1 but it is for the purposes of informing our
2 customers, stakeholders and general public the
3 attributes and procedures for BMO. We will have
4 an ordering guide up there. We will have
5 templates for agencies to use for Statements of
6 Work, if they need help developing scopes or want
7 feedback on their scope, we'll have that on there.
8 Information about obtaining training on the
9 Delegation of Procurement Authority, etcetera. So
10 really if you are out promoting your contract,
11 this is someplace that you can send a customer to
12 get more information about the vehicle.

13 Okay. Minimum Task Order Awards. This
14 is -- those of you who are doing federal
15 contracting, if you have \$125,000 in the first two
16 years and then each 12 month period thereafter to
17 maintain your federal contract. So this is
18 different than the schedule. For the unrestricted
19 you have to have a minimum of five task-order
20 awards or total sales of \$1.25 million the first
21 five year period in order to proceed to be awarded
22 the option. For the small business set-aside it's

1 three task orders or \$325,000 in sales. So we
2 know, especially the small business order, you
3 might get one order that's for half a million
4 dollars, maybe that's all your company can handle
5 in that zone, that's fine, you're making an
6 effort, you're performing under the contract.
7 What we want to avoid is possibly getting the
8 contract and then just kind of sitting there, not
9 bidding on anything, not getting any work. We're
10 not going to continue with a company that's not
11 performing, not engaged under the contract.

12 So we also recognize you might get --
13 you might be successful getting orders, but maybe
14 they're \$10,000, maybe they're 50,000. We don't
15 really know what the dollar value is going to be
16 coming through this. So if you're able to get
17 multiple orders, but they may not reach 1.25
18 million, you know, we recognize that's a
19 possibility too, it shows that you're trying, it
20 shows that you're engaged. Obviously, if your
21 number is close to either one of those thresholds,
22 the Contracting Officer has the discretion of

1 whether or not to exercise your option.

2 Okay. So we also have on-ramping,
3 dormant status and off-ramping features with this
4 vehicle. So on-ramping, there's three different
5 types. If you will, we talked about the NAICS
6 Code. If your company were to become too small
7 and you were to become large, after the first five
8 years you would be off-ramped from the small
9 business set-aside, but you would have the
10 opportunity to submit proposals for the
11 unrestricted. It's not a guarantee, you're not
12 automatically going to be moved over. You have to
13 meet the same requirements that everybody else has
14 under unrestricted to be moved over to get that
15 award. So that's what we call vertical contract
16 on-ramping.

17 There's also the possibility we well
18 conduct open season on-ramping. Unlike schedules,
19 this is not a standard solicitation, it does have
20 an opening and closing date, but if we determine
21 based on the volume of sales that's going through
22 or just we need more contractors, we can have an

1 open season where we open it back up for
2 proposals.

3 And then focused on-ramping, sub pool
4 creation. This could be we need -- maybe we
5 didn't get a strong response from HubZone
6 companies the first time we awarded it and so we
7 want to do a focused on-ramping for HUB, we can do
8 that. It kind of depends on customer feedback,
9 what they tell us they're looking for that they're
10 not seeing on the vehicle. It may be that we need
11 more -- to add more services, add different
12 service categories. There's kind of some
13 flexibility there.

14 So the dormant status is for those
15 companies I mentioned a minute ago, get a contract
16 award and then do nothing or they don't perform
17 well, we get complaints. They could be placed on
18 what's called dormant status, which means they
19 will continue performing on any orders that they
20 currently have, but they will be taken out of
21 consideration for getting new contract awards
22 until they can kind of right the ship. We may

1 place them on a get well plan, you know, what can
2 they do to make it better or, you know, if they
3 say, no, I'm just not -- our company is taking a
4 different direction, this is not what we want to
5 do anymore, we're not interested in pursuing it,
6 we may off-ramp them from the vehicle or if they
7 can't tell us, you know, the plan that they're
8 committed to make improvements or they engage in
9 another vehicle, they may also be off-ramped. So
10 situations like that are again why we have the
11 on-ramping flexibility. If we were to lose
12 companies due to off-ramping, we may need to add
13 more, depending on what the customer's demand is.

14 And if we do decide to do any
15 on-ramping, those with the opportunities will be
16 posted to the Federal Business Opportunities
17 (FBO).

18 Section I, Contract Clauses. We are not
19 going through the contract clauses. I'm sure you
20 can read those at your convenience. One I am
21 going to point out that Mary mentioned, we do have
22 a waiver, class waiver to Paragraph C of FAR

1 52.212-4. This allows for unilateral changes to
2 be made by the government in situations impacting
3 safety or working conditions or when it is in the
4 government's best interest.

5 The reason there was a waiver put in is
6 that in commercial contracts you will usually only
7 see a bilateral change clause. One of the, I
8 guess desires and wants of our commodity team
9 agencies was that sometimes they find it useful
10 for non-commercial or contracts with
11 non-commercial terms and conditions. So that's
12 the point that I wanted to point out to you.

13 Section J. Attachments. I'm going to
14 highlight some of important ones to focus your
15 attention on. So the first one you will see is
16 BMO Phase II, Zone 2 through 6 Questionnaire. We
17 mentioned that earlier. Please take a look at
18 that. We do want your feedback. Please send that
19 back in. It's not bold, but J.2, the proposal
20 checklist. When you are doing your offer for the
21 final that will be something you'll have to
22 complete and send back in. Just make sure that

1 you've gotten all the documents together because
2 there will be a lot. I'm warning you right now,
3 you will not want to leave one out and then get
4 thrown out.

5 J.3, is a Self Scoring Worksheet. This
6 is maybe different from what a lot of you have
7 seen before. It's where we're going to ask you to
8 go through and score your proposal and send into
9 us. And then we will look at that and I'll
10 explain more about this after our break. We will
11 look at that and say, okay, you scored yourself
12 here, but we don't see all of that in your
13 proposal here. And then we'll ask you about the
14 discrepancy. J.4, Standardized Labor Categories
15 and Definitions. I recommend you take a hard look
16 at those and review those. And also that's an
17 area we would like some feedback. So if you don't
18 see a labor category in there that you think
19 should be there, let us know. Because we went
20 round and round and round on those, so there's
21 lots of feedback, lots of hours of going into
22 that, but we want your feedback too.

1 The Price Template J.9, this is what we
2 used for Zone 1. If you have feedback on this,
3 please let us know if we need to make any changes
4 to it. If you think something is missing, please
5 write it down. There's a separate section,
6 separate tab in that spreadsheet for non-exempt
7 labor categories and exempt professional labor
8 categories.

9 The wage determination. You can see we
10 have five of them listed up there. What we've
11 done is taken the wage determination from the city
12 or the area that had the highest minimum in each
13 zone and we'll talk a little bit about that at
14 very end of the pricing.

15 Relevant Project Experience Template.
16 Take a look at this, it does ask for a whole lot
17 of information unfortunately because we need all
18 that information to evaluate your proposal.
19 However, it is not the most streamline form we
20 will admit that. So if you have ideas on how to
21 make any of that easier for you to fill out,
22 easier for us to look at please send that into us.

1 The Project Zone Coverage Template we
2 will talk about and then at the end, J.13,
3 Subcontracting Plan. Small businesses
4 subcontracting plan there's a template posted and,
5 again, that's only for unrestricted if you are the
6 owner of a small business. Small businesses can
7 bid on the unrestricted, but you will not be
8 required to submit a contract plan.

9 Section K, Representations and
10 Certifications Standards. Make sure that you
11 follow the instructions located in the
12 solicitation closely when you're doing your actual
13 offer. And I believe we ask for actually the
14 section to be submitted and not just send us your
15 copy of the instructions.

16 Q Okay. Section L. This has instructions
17 for offerors, also provisions, FAR & GSAR,
18 regulations and acquisition regulations. It
19 discusses the proposal format and how we will take
20 questions. So this applies to the draft as well.
21 I can tell you for Zone 1 after we posted the
22 final RFP, we got over 400 questions. So if you

1 read all those in one e-mail at a time, it's very,
2 very difficult for us to assemble that and answer
3 it, it will take us a long time. It would help us
4 a lot if you follow these instructions and submit
5 it in an Excel file and we can copy and paste and
6 post it on Interact. A whole lot easier for us.
7 Please follow this format.

8 Obviously the zone number on this draft
9 is going to be irrelevant because we posted the
10 drafts for all the zones so that will matter more
11 on the final. If you can give us section number,
12 title, question, this helps us answer a whole lot
13 faster.

14 Offerors shall include both hard copies
15 and electronic copies, again, this is for the
16 final. For Zone 1 we asked for 10 hard copies.
17 We are considering lowering that for the future
18 zones, probably somewhere around five. We don't
19 know for sure yet, we will still be asking for
20 hard copies and electronic copies. Unfortunately,
21 this is open market, there's no system for us to
22 receive proposals electronically. You know, you

1 can't e-mail them to us because the files will be
2 too big unless you were doing ten e-mails. Nobody
3 wants that.

4 We are going to stop there before we get
5 into M because M is going to take a little while
6 and we will take a break, 15 minutes. So I have
7 right before ten, so 10:15 come back.

8 (Recess)

9 MS. SNODDERLY: I'm going to make the
10 announcement again, if you registered and we got
11 your information where you registered, whether you
12 had to write in your information when you got here
13 or whether you preregistered, we will be sharing
14 that registration list so that you'll have company
15 contact information. If you do not want your
16 contact information shared, let us know, otherwise
17 it will be shared with attendees, just not here,
18 but we're going to share all the lists from all
19 five events. Okay. Janet.

20 MS. SCHWEER: Section M, which discusses
21 the evaluation factors, which probably everybody
22 wants to know a little bit more about. The basis

1 of award for our vehicles will be on the best
2 value continuum. We will be using the highest
3 technically rated offerors with a fair and
4 reasonable price. So what that means is we're
5 looking for core technical expertise in a variety
6 of services with capabilities that are most
7 important to government customers. And all
8 evaluation factors other than cost and price, when
9 combined, are significantly more important than
10 cost or price. So it's not always the lowest
11 price is acceptable. This is not just straight
12 best value like a federal contract. We are
13 looking for the best of the best technically to
14 give our customers the best selection of companies
15 that meet their needs. As you know, a lot of the
16 government agencies right now, including GSA, are
17 looking for ways cut their costs. We need
18 companies that can find innovated ways of doing
19 that. We need companies that are experienced in
20 these services, have done them for a long time,
21 they know how to take care of a building in order
22 to help the agencies reduce their long term costs.

1 The government intends to award
2 contracts without discussions. So your initial
3 proposal must contain your best offer. We may
4 conduct clarifications and we reserve the right to
5 conduct discussions if we determine it's necessary
6 or in the government's best interest. It does go
7 faster, of course, if we don't conduct
8 discussions, but we will if we have to even if we
9 don't think it's in our best interest. So please
10 make your first offer your best offer if you can.

11 Okay. So a little bit different
12 screening evaluation then what you may have seen
13 before. We're using a two-step screening process
14 for all offers. As I mentioned we'll be looking
15 at your core documents. Verify your support
16 documents are there. We will go through and make
17 sure you submitted each section, so we're going to
18 look and make sure you submitted your staffing
19 plan, your sustainability plan. If you're a large
20 business we will make sure you submitted your
21 subcontracting plan. We will go through and make
22 sure all the key documents are there. We will

1 compare it to your self-scoring worksheet. If we
2 see discrepancies, as I mentioned before, you say
3 that you can do fire alarm maintenance services
4 and it's not on the projects and we don't see
5 that, we're going to ask you to clarify.

6 The evaluation team will assign
7 preliminary scores in accordance with the Scoring
8 Table. So the scoring worksheet we receive we
9 will go through that and see if your score adds
10 up.

11 Section 1, General Information. The
12 general information section consists of the
13 following subsections. Standard Form 33, the
14 proposal checklist, self-scoring worksheet,
15 meaningful relationship commitment letters if
16 applicable, existing joint venture/partnership
17 document, if applicable. There's more information
18 about those in the solicitation. It is kind of
19 the confusing part of the solicitation. Please
20 send us your questions on those. What I have
21 found in the other Industry Days from our previous
22 sessions, there are a lot of very specific

1 questions you may have about your company's
2 capabilities or partnership that you already have
3 in place or that you may put in place, it's
4 difficult to give generic answers. So try to have
5 specific questions and we can get answers to
6 those.

7 Section 2, Responsibility. We do have
8 to make responsibility determination for each
9 company in accordance with FAR, part 9. So we're
10 going to look at the following, we'll look at your
11 SAM and that's System For Award Management. For
12 anybody who doesn't know this has replaced CCR,
13 the Central Contractor Registry several years ago.
14 This says to include detail EPLS. EPLS is
15 Excluded Parties List System. This is where
16 contractors who are barred from doing business
17 with the federal government are listed. You do
18 not have to check that, we will check that when we
19 get your proposal. But that's one of the things
20 that's listed in your SAM record. So if you're
21 curious we'll look up your company up and make
22 sure you're not barred.

1 Representations and Certification,
2 Financial Information GSA Form 527. You may have
3 seen this form already in other requests for
4 proposal from GSA. Basically that's asking for
5 company balance sheets, income statement, banking
6 information. There's a box on there where you can
7 check and just attach your company's financial
8 statement, but please, again, I'll get on my soap
9 box, make sure you're reading the instructions for
10 the form. There's parts of this that may say only
11 complete this section if you're a client or GSA
12 public building contractor. This is not a GSA
13 public building contract. You do not need to
14 include that section, but there are other sections
15 that you need to complete in addition to attaching
16 your financial statements, so please read the
17 instructions.

18 Pre-award Survey Standard Form 1408 is
19 fairly straight forward and fairly simple. Let us
20 know if you have any questions.

21 Section 3 is a big section. Technical
22 Experience/Relevant Project Experience. So all of

1 those things I talked about earlier you have to
2 show us that you can or that you have performed
3 and have experience in those areas in order to
4 qualify. You have to show us three projects where
5 you have done each of those service offerings. So
6 if you said HVAC services, you have to tell us
7 three projects where you did the HVAC services.
8 If you said HVAC and electrical services, you have
9 to show us those three projects. They can be the
10 same project, you can have multiple services on
11 one project, that's fine, but you have to make
12 sure that you have three for each of them. This
13 is the same for the required and the optional. So
14 you can't just say, oh, I want to offer fire alarm
15 services and commissioning services and those are
16 my optional services. You still have to submit
17 part of the experience for the optional services.
18 You still have to submit three for each of them in
19 order to qualify. So the requirements for those
20 are the same. However, I can tell you if you
21 don't meet the requirements for the required
22 services, you're not going to get a score for the

1 optional services. There's no point in us
2 appointing someone who does not qualify for the
3 required services.

4 And, again, there could be a whole lot
5 of projects that you can submit, especially if you
6 have individual projects for each service
7 category. That's fine. That's how many your
8 company has and that's what you want to submit.
9 It would probably be a little easier on you if you
10 have projects where you have done more than one
11 service. Submit those and it will be easier on
12 us, have a little bit less paperwork to go
13 through.

14 There is a limitation on the number of
15 words for the service description. Right now we
16 have 1000 words. We know that if you're offering
17 five different services on one project, 1000 words
18 is not very many. So we're looking at that trying
19 to figure out how we can make that work and still
20 give you enough room to describe what you have
21 done without making it 20 pages per project. So
22 we're looking at that right now.

1 Other requirements on the project
2 experience, the unrestricted solicitation. The
3 project has to have been completed within the past
4 three years or be ongoing. For small businesses
5 this is one within the last five years or ongoing.
6 When does that three year period start? It would
7 be on the date the proposal is due. For example,
8 Zone 1 the proposals were due December 18th.
9 Anything that you completed in the three years
10 prior to December 18th, 2015, will qualify. So it
11 depends on the date the proposals are due. If
12 it's ongoing, you just got the award a month ago,
13 it doesn't count. We want to see something that's
14 been performed for at least a year. It doesn't
15 have to be something that's been completed, but we
16 want something that's been ongoing for at least 12
17 months. We have to have -- there has to have been
18 enough experience there for you to tell us what
19 you've done; the point of contact there for them
20 to tell us how you performed. A month, two months
21 is not enough.

22 Projects submitted may be U.S. Federal

1 Government, U.S. State Government, Non-Government/
2 Commercial. No restrictions there. We'll talk
3 about this in a minute, but they can be -- could
4 have been performed anywhere in the country. It
5 doesn't have to have been performed in the zone
6 that you're applying for. There is a potential
7 for additional credit if they are performed in the
8 zone at multiple locations, but it's not a
9 requirement.

10 Each Project Shall identify the
11 following: Building type, building size, square
12 footage, stories of each building, services
13 covered relevant to the scope of services, so
14 whether it was HVAC with plumbing. Performance
15 period, beginning and end date, so the month and
16 year, months and years. We need the month and
17 year. Total dollar value, the number of trade
18 skills employed and number of exempt positions
19 employed, a complete, clear concise detailed
20 statement of the description of services covered
21 in the project. So do not copy and paste a
22 description of services from the solicitation into

1 this part. We know what we put in the
2 solicitation. We need to know what you did on
3 that project. We need to know how you did it.
4 Okay. I did HVAC maintenance for this National
5 Weather Service building. Great. How often did
6 you do it? What kind of preventive maintenance
7 did you do? What kind of systems did you
8 maintain? Did you have master level technicians
9 do it? Who did it for you? That, again, I know
10 1000 words is not very many, so we're going to
11 think about that because we need to make sure that
12 we're getting from you details about what you did.
13 Again this is highest technically rated. We need
14 to know these companies are experienced and can do
15 this work and know what they're doing.

16 Okay. And now we're going to talk about
17 additional evaluation credit. So the projects you
18 submit can be for any customer. If your project
19 was for a federal government customer, you get
20 additional credit. If your project involves
21 subcontracting or teaming for two services with at
22 least two separate entities that are certified

1 small business you get extra credit. However,
2 this is only for large businesses.

3 If you're a small business, you don't
4 get extra credit subcontracting, only the large
5 businesses do.

6 The optional services. So if you can
7 qualify for any of the optional services you will
8 get credit, one additional credit for each. I
9 don't know what the point value is, but you get
10 credit for each additional optional service that
11 you qualify for.

12 Extended Contract Duration. If the
13 contract was over three years you can get
14 additional credit. We want to see companies that
15 have been in the building or facilities for a long
16 time. That shows us that they can do the work and
17 can take care of the facility. Large square
18 footage. So right now we have over 20,000 square
19 feet. First feedback from others that's really
20 not very big. So we may look at having different
21 thresholds for that for the unrestricted for small
22 business solicitations. But just to give you,

1 that is one additional credit, evaluation credit
2 that's in there right now.

3 Successfully demonstrated innovative
4 approaches to achieve savings. There is a section
5 in this template where you can tell us if your
6 company did some kind of innovative approach to
7 achieve savings in a facility. For example, let's
8 keep using the National Weather Service because
9 that's where we are here. You're maintaining this
10 building and at the beginning of the contract the
11 contractor says, I have to save ten percent on my
12 utilities in this building over the next three
13 years. I need your help, how are you going to do
14 that? Tell us in your relevant experience how you
15 did that, what they asked for. If they asked for
16 10 percent utility savings, what you did and what
17 was the result and you will receive additional
18 credit for that on each project.

19 These apply to the projects for the
20 required services only. So if you submit your
21 optional services and those are federal government
22 customers, great, you're not going to get

1 additional credit. The only additional credit
2 you're going to get is if it was scored on the
3 required services. And that's mostly a math
4 thing, otherwise we're giving additional points.

5 Socio-Economic Status Certification.

6 This applies only to the small business
7 solicitation. Mary mentioned at the beginning if
8 your company holds an additional socio-economic
9 certification such as woman-owned, HubZone, 8(a),
10 veteran-owned, et cetera, you can get additional
11 credits for each of those on the small business
12 side. Okay.

13 Project location. I alluded to this a
14 couple times. We require companies bidding to be
15 able to deliver to all the states in the zone.
16 Your company may not have done that before, that
17 is fine. Tell us if you have, your overall
18 capability of providing service coverage for all
19 the states in the zone that you're providing a
20 proposal for, any of the states that you have
21 performed in and if you've never provided coverage
22 in any of those states in the zone how would you

1 do it if you were awarded this contract.

2 So take for example Zone 6 where we are
3 now, maybe your company performed everywhere but
4 Nebraska. So if you tell us in the proposal
5 template how would you perform in Nebraska, would
6 you open another office there? Would you look
7 into subcontracting somewhere out there, would you
8 hire more people and just have satellite people
9 that went out there, tell us how you would do it.
10 The template doesn't exactly state how long your
11 answer should be. I'm going to give you a tip, it
12 should be more than one sentence, okay. It
13 doesn't tell us a whole lot. We really need to
14 see how your company would do this, it gives us a
15 lot more confidence in your ability to deliver to
16 all of those states.

17 Another opportunity for additional
18 evaluation credit I mentioned before, you can
19 submit any project, could have been delivered
20 anywhere in the country or the world, but if
21 you're -- if any of your projects required
22 services covered multiple locations in the zone

1 that you're bidding on, you will get additional
2 credit.

3 For example, if you had a required
4 service project and you delivered to Kansas and
5 Iowa, you will get additional credit. So it has
6 to be for two, basically at least two locations.
7 So if you have that experience in any of the
8 states that you're sending your proposal for, it's
9 in your best interest to use those projects.

10 Okay. Section 3, Staffing Plan. The
11 staffing plan should identify roles and
12 responsibilities for all employees. Since we
13 don't have specific buildings for you to bid on
14 for this proposal, you may not know exactly who
15 you need in those buildings, tell us your key
16 personnel, what their responsibilities are, who is
17 going to manage the work, managing the orders,
18 etcetera.

19 Professional compensation plan and
20 uncompensated overtime policy, as a schedule
21 holder you have probably seen this before and
22 others may have seen these before too, we need you

1 to address your methodology for determining
2 salaries and fringe benefits for professional
3 employees. And then your company's policy for
4 addressing uncompensated overtime. The
5 requirements for this again are, you know, we
6 don't say oh, this should be a paragraph or it
7 should be a page, it should be more than a
8 sentence, okay. Please tell us what your company
9 policy is.

10 Okay. Section 3, Subcontracting plan.
11 We're not going to go through all the plan today
12 because Amy will have a whole days class on the
13 plan. I'm going to give you some pet peeves of
14 mine and to touch on things to look for. Again,
15 we're going to give you a template. You are not
16 required to use the template we provide to you.
17 However, that template outlines everything that is
18 required to be in your plan. So if your company
19 has a different model plan, you can use that,
20 that's fine. Please check it against our template
21 to make sure you covered everything. It really,
22 really slows us down, the more we have to read

1 through all that. It really slows us down. So
2 look and make sure you covered all of the required
3 elements, okay. An easy thing to miss, put your
4 phone number on the first page, your address,
5 those are easy things to miss on the first page.
6 So just a thought there.

7 The other one is the plan requires that
8 you identify a plan administrator or program
9 administrator for subcontracting opportunities.
10 And I don't think it's required, but we would
11 suggest you list an alternate person as well.
12 Turnover happens. These plans can be a couple
13 years into them before somebody comes back and
14 says, hey, you guys are not doing reporting, who
15 is suppose to be doing this, and then you realize
16 that person left six months ago, so sometimes it's
17 good to have an alternate on there.

18 The other thing is the plan has to be
19 signed. It has to be signed by someone at your
20 company who is one level above the plan
21 administrator. So if I'm the plan administrator,
22 I would need Teresa, my boss, to sign it, she's a

1 level above, okay. It can't be the same person.
2 Those are my pet peeves. I'm sure Amy knows a lot
3 more, but those are the one I'm going to cover
4 right now.

5 Sustainability Plan. There are required
6 sections that are identified in the RFP for your
7 sustainability plan. We're asking about your
8 approach toward implementing and promoting
9 sustainable practices in all aspects of BMO
10 services. There is an opportunity here for
11 additional evaluation credit. There's a section
12 where you can tell us what your company has done
13 to implement sales and practices above and beyond
14 the minimum performance requirements. The minimum
15 performance requirements are in another section of
16 the plan. So if your company has done something
17 else that is just fantastic and awesome, just put
18 it in there. It's not required.

19 Quality control plan. Most of your
20 companies probably have a standard quality control
21 plan that is -- the types of services that you can
22 submit. I think there is case limitation on this

1 possibly so look at the solicitation for that.
2 It's a pretty generic description of your internal
3 procedures and identify the rules of
4 responsibility for insuring quality control.
5 Okay.

6 Second 3, Past Performance. So past
7 performance surveys for the same relevant project
8 experiences submitted. So you need to be tied
9 back to the projects that you actually submitted.
10 We're asking for three surveys, no more than three
11 surveys. Even though you may be submitting ten
12 projects to us, maybe 15 projects to us, we only
13 want three past performance surveys. We know it's
14 a burden on your customers to take the time out to
15 do it. We recognize that and we will be checking
16 on those who say they have government experience,
17 we will be checking the government performance.
18 That is just one component though because not
19 every company is going to have government
20 experience in there. So three past performance
21 surveys. A lot of times in the solicitation
22 you'll see where we will ask for surveys to be

1 sent directly to the contracting officer instead
2 of to us. They need to be sent back to you by
3 your customer and then send them in with the
4 proposal. We don't want to keep track of all of
5 the past performance surveys and try to make sure
6 we get them tied back to the same company.
7 Unfortunately, since this is a government
8 acquisition, there's lots of offerors, so we don't
9 want to be responsible for losing something so it
10 needs to come in with your proposal. When past
11 performance information is not available, the
12 offerer will not be evaluated favorably or
13 unfavorably. You will receive a neutral rating.

14 And finally the price. This is not the
15 same as what we do on schedule plans right now.
16 Patrick and I and Mary we all came from schedules.
17 We know how the schedule pricing works. This is
18 different. We are not awarding fully burdened
19 rates. We will be asking for firm fixed price
20 hourly rates for the labor categories that you're
21 offering. But for the purpose of our price
22 analysis at our level, we will be asking for those

1 fully burdened rates. Those will not necessarily
2 be the standard rates for the task order level.
3 The reason for that is, we narrowed down the base
4 rates and the health and welfare rates will change
5 according on where you're performing. The base
6 rate is based on -- this says SCA, Service
7 Contract Act, it's also called -- now it's called
8 Labor Contract Standards, is that right? Service
9 Labor Contract Standards. But for the purposes of
10 your performance for us, we're going to give you a
11 rate determination, so we talked about that on the
12 slide with the attachment. So for here -- what is
13 the one for here?

14 MS. SNODDERLY: Chicago.

15 MS. SCHWEER: So we will give the rate
16 determination for Chicago. So for any of the
17 categories you're proposing you would use the base
18 minimum and the health and welfare rate for
19 Chicago and then you'll add your company's
20 overhead, G&A profit and other costs to show fully
21 burdened rates. So you use the fully burdened
22 rate for your price analysis. So we will compare

1 it with market prices and etcetera. But then when
2 it comes to task orders you're going to be using
3 the overhead G&A profit and other costs
4 percentages that you proposed to us and applying
5 to whatever the prevailing wage rate is for the
6 task order level to get your proposal that
7 task-order level.

8 This is a little bit different we know,
9 so basically, your percentages on the overhead,
10 G&A costs and other costs. Those are your ceiling
11 percentages. You can go down from those
12 task-order levels if you want to, but you can't go
13 higher than that. Because what's going to change
14 for everybody is the base rate. So if you're all
15 going to bid on the building and there's a
16 collective bargaining agreement in place for some
17 labor category for the building, you're all going
18 to be using the same collective bargaining
19 agreement. It's going to be part of that.
20 There's no -- that's an even playing field. So
21 when comes to differences in the pricing is when
22 you get into the other indirect elements. Okay.

1 Now this is for the non-exempt categories. For
2 the exempt or professional categories you're going
3 to give us a breakdown so those will end up as
4 fully burdened rates. That will be the same for
5 any of the performances that take place under the
6 task order. So if there are different tasks we
7 will take a look at those. We also ask for
8 government and commercial prices for the labor
9 categories that you're offering. Those who are
10 familiar with the schedule and others, we are not
11 asking for your most favorite customer pricing,
12 we're not asking to identify discounts. The
13 pricing will not be tracked that way as it is on
14 schedules.

15 And we are also asking for tiered
16 pricing. There's a tab at the price proposal
17 template. This will look a lot like volume
18 discounts. So we're going to give you the tiers
19 and it will point your company, it will offer a
20 discount. So say for a task order between one and
21 five million, what additional discount could your
22 company offer? For a task order over five

1 million, what additional discount could your
2 company offer? Everybody is using the same
3 threshold, same tiers. It's your job to tell us
4 what additional discounts your company can offer.
5 And it's no different for the small and the
6 unrestricted, so don't hold me to the between one
7 and five. Over five I don't know what they are.
8 Sorry.

9 That is the end of my part of the
10 presentation. I'm going to hand it back over to
11 Mary and I'm sure everybody has questions. I see
12 lots of cursory writing. Mary has a couple things
13 to go over.

14 MS. SNODDERLY: Okay. Take a deep
15 breath. That was a lot of information to go over.
16 And like Janet said, we're going to get to the
17 questions in just a minute. Before we do that
18 though I want to talk a little bit about next
19 steps. Janet talked about this earlier, but just
20 so we're all on the same page here, the draft RFPs
21 close February 25th. That has been extend from
22 February 5th. Okay. I see -- the questions and

1 comments, that means they're due February 26th.
2 And then the questionnaire that Janet brought up
3 is due March 4th now. Again, we expect to release
4 our final RFPs sometime this summer. I think
5 Janet said late May, early June timeframe just so
6 you're aware of that. E-mail, I have an e-mail
7 address up here. This is a very important e-mail
8 address. If you want to get in touch with anybody
9 on the BMO team, we suggest you use this
10 particular e-mail address. This is because we
11 travel. We may be on leave, different things may
12 come up and that way we all have access. All of
13 us on the team have access to this e-mail and that
14 way your e-mail won't sit in somebody's inbox for
15 awhile. We'll be able to get it and get any
16 questions or get you any information.

17 Before I go on to the next one, I'm
18 going to make my announcement again and this is
19 the last time. Your information, your company's
20 contact information will be shared with all
21 attendees of all five sessions, but if you do not
22 want that, please let us know so we can mark that

1 down that you do not want that information shared.
2 Sorry, I just got to make sure everybody
3 understands that. Okay.

4 So we kind of told you what is going to
5 happen and given you some dates on everything.
6 What I want to do now is just for the next few
7 minutes before we start questions, I want to give
8 you an introduction to what is called the
9 Acquisition Gateway. The Acquisition Gateway is
10 basically a virtual office space where agencies
11 get-together, collaborate, share best practices,
12 share information, hopefully to make their
13 procurements a little easier. If they have
14 questions on something, maybe another agency has
15 done something unique or different that could help
16 them. I do have the web link up here on this
17 slide. I know you're saying I said this is for
18 agency use. What does this mean to industry?

19 Actually once you got to this particular
20 web link, it will take you to a sign-on. The
21 sign-on here, you can see we have two different
22 areas. I know the screen is maybe a little hard

1 to read. We have the federal employee sign-in for
2 any federal people in here that uses your own GMAX
3 sign-on. And then we also have a non-government
4 sign-in. This does mean that industry you will
5 have access to this. Now you're not going to have
6 full access, you're not going to see everything
7 that a government employee will, but you will have
8 access to this. To my knowledge it is not open
9 yet for industry. They were hoping to get it done
10 by the end of the calendar last year. Some
11 glitches happened. They were hoping to have it
12 done at the end of January. I have not heard
13 whether they actually got that opened up yet. If
14 you try to get in and you can't, please give us a
15 little bit more time. We will post something out
16 on the BMO interact page when it is live and open
17 to industry.

18 Once you sign-on, this is the screen
19 that you get to and what it looks like. I know
20 again it's a little hard to read. What this has,
21 right now we have what we call 19 different
22 hallways available and the hallways are like the

1 different categories. Remember we talked about
2 Category Management. It's got the various
3 categories. There's a facilities hallway
4 available. We're putting information not only on
5 BMO Schedule O3-FAC, this will be an effort where
6 all government contracts -- the goal is to get all
7 government contract information loaded on this
8 gateway. Like I said, there's a facilities
9 hallway. We're posting information kind of like
10 coming soon for BMO. Once we have the contract
11 vehicle awarded, information will go on that
12 hallway about the BMO contract for each zone.
13 Also we do expert articles. There's a lot of
14 information that's posted out there that is
15 available.

16 Now I just want to give you a very, very
17 brief quick introduction to the Acquisition
18 Gateway. There will be additional training for
19 federal employees who have access now. We can
20 provide additional training. I'm sure we will
21 offer something for industry once we actually get
22 industry to go live. I don't know if it will be

1 our level or central will offer that training, but
2 we will have something available for you.

3 Okay. We are getting ready to move to
4 the questions and answers. Before we do I have
5 referenced the BMO interact page a number of
6 times. That is where we will post the transcripts
7 from all five events as well as the slide deck.
8 We have used the same slide deck for all five
9 events. It will probably just be master slide
10 deck that we post. Here is the website for that
11 BMO interact page. This is very important that
12 you have that again because that's where we're
13 going to post all the information. This is also
14 where we post questions. We put a lot of
15 information out when we're seeking feedback from
16 industry as we get ready to, like Janet mentioned,
17 Phase 3, as we start moving into there, we'll
18 start posting information first to the BMO
19 interact page. I see everyone diligently writing
20 it down.

21 So while you're writing it down, I'm
22 going to give you a few instructions. We're

1 getting ready to open this up to the questions and
2 answers.

3 What we ask that you do, we can try this
4 without microphones. If we have trouble hearing
5 we may have to ask you to use the microphones that
6 are on the tables. But would you please state
7 your name and your company name and even if you
8 ask multiple questions, again state your name and
9 your company name again so we can get this for our
10 court reporter.

11 Okay. With that said, and then we have
12 Janet, Patrick, Teresa, myself and we will answer
13 questions you have. First question. Yes, sir.

14 MR. DURINGO: Hi, my name is Mike
15 Duringo, from HTRT. I think my first question is,
16 and I know that you know OASIS has a particular
17 suite for Facility Support Services. You
18 mentioned that every agency will have an
19 opportunity to use this. Does that mean that, for
20 example, the Army Public Works Director can
21 utilize this if they wanted to expedite the
22 procurement process?

1 MS. SCHWEER: Good question. And yes,
2 they can. It is not a mandatory. Agency can use
3 it as long as their Contracting Officer has a
4 Delegation of Authority.

5 MS. SNODDERLY: Yes, sir.

6 MR. DAGGETT: I'm Gary Daggett from
7 Ameresco. On the past performance, I believe you
8 said three, but there's multiple categories.

9 MS. SCHWEER: Yes.

10 MR. DAGGETT: Does it have to -- does
11 your past performance like for bids on HVAC have
12 to all be HVAC?

13 MS. MCCARTHY: Yes.

14 MR. DAGGETT: It doesn't have to touch
15 all the categories?

16 MS. SCHWEER: No. It does not. We
17 limited it to three trying to think of what --

18 MR. DAGGETT: Whatever comes. So if
19 something is subcontracted and you go with a
20 subcontracting partner, is there a advantage or
21 disadvantage to having that subcontractor partner
22 to perform the past performance?

1 MS. SCHWEER: So I think if I
2 understand, say that Ameresco was the prime
3 contractor and they subcontracted parts of that?

4 MR. DAGGETT: Yes.

5 MS. SCHWEER: You can you still -- can
6 you still submit the past performance survey from
7 that project?

8 MR. DAGGETT: It would behoove us to
9 have our subcontractor submit one of the three as
10 past performance to show they can perform.

11 MS. SCHWEER: It needs to be like
12 end-user. So whoever was your customer needs to
13 be -- sorry.

14 MR. DAGGETT: So it would primarily be
15 the prime alone, not the subcontractor?

16 MS. SCHWEER: Yes. Yes, sir.

17 MR. HARRIS: Eric Harris, CML. In the
18 summer of 2016 when these are all released, Zones
19 2 through 6 will all be separate proposals. So is
20 there going to be -- I know from doing one there
21 will be a box to check that says is this for all
22 of them or is it going to be five separate

1 proposals?

2 MS. SCHWEER: That's a good question.
3 And we don't have a firm answer on that yet. Our
4 intent right now they will all be separate, but I
5 know there's going to be questions and we
6 recognize some of you may be bidding on multiple,
7 that's whole lot of work. So if you have
8 suggestions on how we can do that. You also have
9 to keep in mind right now they are all separate
10 contracts too, so we need separate proposals for
11 each one technically. So I don't know if we have
12 a great answer for that yet, but it is something
13 we thought about because it's a big burden to you
14 to submit all five of these at once.

15 MR. HARRIS: Just stagger them so not
16 all five are due on the same day.

17 MR. MAZZEI: Just to add, it wouldn't
18 actually be five, it would be ten.

19 MS. SCHWEER: It may be ten.

20 MR. MAZZEI: Because there was the
21 unrestricted part and the small business part.

22 MS. SCHWEER: Most of you will be

1 bidding on both for each of those? So, yes.

2 MS. MCCARTHY: We have some folks up
3 north that kind of dictate some of our schedules,
4 but we -- it behooves us to schedule those to do
5 the same thing as what you desire because we have
6 to evaluate them. And it's hard for us to find,
7 you know, a lot of evaluation folks and the
8 Contracting Officers and everything, we're going
9 to try to do that, try to stagger them.

10 MS. SNODDERLY: You heard me state
11 earlier that we got the three of us, Janet, myself
12 and Patrick and we only have two Contracting
13 Officers back at the office, so it's a small team
14 is what I was getting at.

15 MS. RESNICK: Hi, my name is Karen
16 Resnick, and I'm the owner for Nodaway (sic)
17 Services. I'm a HVAC and plumber contractor in
18 Region 5. Under this procurement tool it would be
19 Region 6.

20 MS. SCHWEER: Zone 6.

21 MS. RESNICK: That's right. But my
22 question to you is this: Zone 6 has many areas,

1 states. So what you're saying is that since I
2 concentrate my work in Illinois, I would not be
3 eligible because I could not perform services in
4 those different states if I don't have a plan how
5 to execute them because right now I don't have
6 that plan because I'm under a collective
7 bargaining act in Chicago. And so to maneuver
8 that would be a little different, so would I be
9 eligible for this new procurement tool if I can
10 perform those services in other zones, which I
11 don't know because I never looked into it. I'm
12 just curious.

13 MS. SCHWEER: There's a couple questions
14 there. One is does your company want to go to the
15 other states in the zone. You have to kind of
16 want to do it and then, you know, are you going to
17 qualify for the required services. Again, they
18 don't have to have been performed in any of those
19 places, you can qualify possibly based on what
20 you've already done in Chicago. But in order to
21 be awarded on a big contract, you would have to
22 show how you could deliver to those other states.

1 So if your company doesn't want to do that, then I
2 would say probably not the best fit for you. But
3 if you do, you want to explore those options and
4 then there's a possibility you will qualify.

5 MS. RESNICK: I don't have past
6 performances in those other areas. Is that okay?

7 MS. SCHWEER: That's fine.

8 MS. RESNICK: One other question. I'm a
9 GSA Schedule Holder. I'm also 8(a) and WOSB, all
10 that good stuff. I have mentors and this is my
11 mentor for the GSA Schedule. How would that --
12 obviously we still use the schedule and this is
13 just going to be an additional procurement tool,
14 okay.

15 MS. SCHWEER: Okay.

16 MS. RESNICK: Interesting. I can see
17 the benefit of this, but it's really making my
18 head spin on the different parts because what if
19 we're stating hourly rates on here and we're in
20 this and we're getting charged 3 percent?

21 MS. SCHWEER: It's 2 percent. The
22 customer is paying the 2 percent.

1 MS. RESNICK: Okay.

2 MS. SCHWEER: Put that invoice to the
3 customer. They will -- they're going to pay it
4 back to you and you're going to pay it back to us.

5 MS. RESNICK: Okay.

6 MS. SCHWEER: You're kind of a
7 pass-through for it. The customer is paying the
8 fee.

9 MS. RESNICK: Great. All right. With
10 my mentor protege agreement, can you use them in
11 this procurement tooling?

12 MS. SCHWEER: Yes.

13 MS. RESNICK: Under GSA Schedule Holder
14 I have that mentor protege, does the mentor have
15 to be on this procurement tool also?

16 MS. SCHWEER: You know, I'm not sure if
17 -- we may have to take that question back and look
18 into it, unless Amy Lara, is back there. No?
19 Okay. So we'll have to look into that, Amy. If
20 her mentor protege relationship, is it recognized
21 as a relationship for the purposes of bidding?
22 I'm not -- I don't know how to answer that. We

1 will have to look into that one. We will post it
2 with our questions and answers.

3 MS. RESNICK: One other question if you
4 don't mind. What happens with the ESCO contracts,
5 do they -- you know, that's a different --
6 Schedule 84, that's under the DOE. Is this
7 overlapping that or totally different because on
8 the spreadsheet it says HVAC and the energy, so
9 I'm confused as to why would -- let's say any
10 government agency, so the government agency is
11 sitting there and he could do the GSA schedule, he
12 can do Schedule 84 and then he could do set-aside
13 for 8(a). What would -- I understand the benefit
14 for everyone because we're all taxpayers, but what
15 about all those procurement tools including the
16 WOSB, how are they going to know which is best for
17 them because they're told it is best for them, so
18 are they going to kind of we don't need the GSA
19 Schedule Holder, we don't need 8(a), we don't
20 need, you know, EDW, WOSB set-asides, I'm confused
21 on that and how this is going to -- I find it to
22 be very hurtful for me, and I'm being very

1 selfish. I want to head into all those schedules
2 and here this new procurement tool, which could be
3 good, I'm not sure about it, that's why I'm here
4 today, how is that going to help anybody? You
5 have the procurement tool already. The end-user,
6 why are they going to use this as opposed to the
7 one that they're using already? Are they going to
8 be forced to use it or do they have a choice?

9 MS. SCHWEER: No. Actually, this is
10 another tool in the toolbox. There's differences
11 in all of those schedules. It's based on savings
12 that you're realizing from the customer. That's
13 not -- there's no authority for that in the
14 contract for example. We have commissioned
15 services listed on an HVAC. This is more
16 maintenance. This isn't come in and overhaul our
17 facilities and tell us and we'll partner and save
18 -- do the energy savings performance contracts.
19 You know, there's differences between this and the
20 schedule. There's differences in the service
21 being offered. The contract terms are different.
22 So, yes, it is and it's not mandatory. It's up to

1 the customer for them to determine which of those
2 tools best meets what they're trying to do. There
3 may be benefits to using this for them and there
4 may be benefits in using schedules for them. This
5 is not intended to replace the schedule, it's not
6 intended to replace the DOE and SPC contracts.

7 MS. SNODDERLY: I was going to kind of
8 tag on to what Janet is saying as well, that like
9 she said customers have different needs. There
10 may be customers out there that are not using the
11 schedules because it doesn't fully meet their
12 needs, but BMO will and I think that's the way you
13 need to look at. It's another opportunity and
14 another tool as they say for the toolbox, for the
15 customer, agencies to utilize. This is a
16 procurement tool, all agencies can use it. I know
17 GSA -- we know GSA likes it and DOE and a couple
18 other agencies. Some of them don't like it
19 because they like to use their own thing, but this
20 is going to be across the board for all the
21 agencies.

22 MS. SCHWEER: Well, agencies can use the

1 schedule now. Like you said some of them like it
2 more than others. I mean this is open to any
3 government agency, the same list of eligibles that
4 the schedule has, but we do have -- I guess the
5 only -- not the only difference, but one of the
6 differences is what Mary mentioned and I
7 mentioned, we have a commodity team that we work
8 with. We have people from almost all the agencies
9 on it, some more engaged than others, but all of
10 them are on it and kind of have an invested
11 interest in this. They helped us put this
12 together. You know, we tried to make it something
13 that they would want to use. We promoted -- we
14 will promote it through them to their agency. We
15 are going to provide training to those agencies on
16 how to use it, but, again, they don't have to use
17 it. We want to make it something that they want
18 to use to make it successful because again the
19 schedules are broader. They're nationwide,
20 worldwide. These are more focused. It's a little
21 bit smaller pool of vendors for a little bit
22 different set of services. Schedule, especially

1 03 FAC, those dry docking services to facilities
2 and maintenance, it's a really big spectrum.
3 There's a wide spectrum on this. We have a lot of
4 questions on this, building facilities
5 maintenance, not necessarily getting into retro
6 commissioning of energy or auditing or anything
7 like that that you find on the energy side.

8 AUDIENCE MEMBER: One of the questions I
9 have is kind of talking about -- has BMO been
10 officially rolled out to the end-user, Contracting
11 Officers, the facility people, government sites?

12 MS. SNODDERLY: The only way it's been
13 rolled out is through the commodity team at this
14 point. We still need actually to get awards.
15 It's not officially rolled out government-wide and
16 as Janet mentioned earlier, we will work with our
17 commodity team to roll it out within those
18 different agencies that are on the commodity team.
19 We will offer training. We have our website. And
20 keep in mind a little bit different now, we do
21 have our GSA E-library for you that are schedule
22 holders. You're listed on there. BMO will be

1 listed on there. But we'll also have a separate
2 BMO website that will list the specific vendors
3 that are awarded by zone.

4 AUDIENCE MEMBER: Is there going to be
5 definitions and guideline specific to what's the
6 best schedule to use based on what their needs
7 are? Because I don't mean this to be offensive,
8 but I've been on Schedule 03-FAC for six years
9 and, you know, a lot of Contracting Officers that
10 I deal with have been around federal government
11 for many, many years and they weren't familiar
12 with what an 03-FAC was and as a result I wasn't
13 awarded the contract.

14 MS. SCHWEER: We can't tell them what's
15 the best schedule for them, what's the best
16 contract vehicle for them. The Contracting
17 Officer has the authority and the discretion to do
18 what -- they have the warrant, they will be
19 obligating the government in the best interest of
20 the government in that facility. We can advise
21 them on the options that are out there. We can't
22 direct them to a specific -- we want them to use

1 it, we're going to tell them why we think it's
2 good, the same thing we use to do to promote 03
3 FAC. We use to go out and tell them it's easy to
4 use. But, you know, unfortunately that is true,
5 there's people working within all the agencies
6 that don't know necessarily about the schedule and
7 we do have plans for going out and promoting it.

8 MR. MAZZEI: Can I add something? So
9 Mary touched on it a little bit at the end. GSA
10 recognizes what we said. Mary talked about it
11 briefly at the end, but that really is what the
12 Acquisition Gateway is for. It's essentially how
13 it's been described to us is if you go into a
14 hallway at a supermarket or any store, right, you
15 see all the different products on the shelf, you
16 can compare. That's exactly what the Acquisition
17 Gateway is being created for. You can go there.
18 You can see the different products, acquisition
19 products, compare, find the benefits and maybe the
20 disadvantages of each to suit your needs and use
21 it that way.

22 AUDIENCE MEMBER: It's been my

1 experience that their sole responsibility is
2 acquisition and purchase, but yet they weren't
3 familiar with all the purchasing vehicles. I'm
4 hoping this gets rolled out, you know, to the
5 point where everybody is educated and all the
6 agencies know what is the best way to acquire
7 this.

8 MS. SNODDERLY: And this is definitely
9 our goal particularly and Patrick said it
10 perfectly, that's the whole purpose of the
11 Acquisition Gateway. Keep in mind we're the BMO
12 team, but schedule also -- Teresa is over our
13 acquisition center which covers both Schedule
14 03-FAC and BMO. We're trying to make it so that
15 the customer can choose what is best for them.
16 And, again, it is getting the word out. You know,
17 as far as 03-FAC, it's still a fairly new
18 schedule. I think it's probably one of the newest
19 that's out there. Yes, I realize it's, you know,
20 a few years old now, but it is still somewhat new.
21 It's 2003 is when we began the 03 FAC so.

22 AUDIENCE MEMBER: Thank you.

1 MS. MCCARTHY: We realize that's a big,
2 big hole in our marketing effort because we got to
3 educate the people that are going to be awarding
4 on these contracts. Now with the commodity teams
5 and what Mary spoke about earlier, we are -- on
6 those teams is the senior level contracting
7 professionals. So we've gotten buy-in from a lot
8 of those folks, so we're going to have to partner
9 with them to get the education down to their
10 contracting professionals. Because that's true,
11 they don't know some of the tools and so we're
12 committed to do that, but you're right, we got to
13 really focus on that so they will know they're out
14 there.

15 MR. DAGGETT: Gary Daggett from
16 Ameresco. On your pricing section and I may have
17 misunderstood it, hopefully you can clarify, it
18 sounds to me like there's two levels of pricing.
19 The first level would be for BMO and that's going
20 to be based on your documentation for those
21 certified rates in the areas that you chose,
22 because there never was like a service contract.

1 So let's say, for example, the plumber
2 is 25 bucks an hour on that rate level. So you
3 get awarded the BMO contract and now a facility
4 comes up and says, all right, we want you to
5 utilize this and this in this facility over here.
6 That particular facility had a plumber
7 substantially hire than the 25 bucks an hour.
8 Although your BMO contract says that rate is
9 \$25.00 for that rate, are you held accountable for
10 that?

11 MS. SCHWEER: What we're asking -- so
12 the base rate will be \$25.00 an hour for the
13 plumber in the base. That's only for the purposes
14 of our evaluation to get you to a fully burdened
15 rate. We know that base rate is going to change
16 no matter where you're proposing, you're not held
17 to that base rate. What you're held to are the
18 percentages of your indirect rate. So if you got
19 a 5 percent profit and a 30 percent overhead --

20 MR. DAGGETT: It's still going to be two
21 bucks an hour, you just don't know the
22 percentages.

1 MS. SCHWEER: Right. Does that answer
2 the question?

3 MR. DAGGETT: Yeah, I think I
4 understand. You want to know the percentages.

5 MS. SCHWEER: Yes. So instead of
6 comparing your company's 5 percent profit to their
7 company's 10 percent profit, it's easier to see
8 the fully burdened rate in the full buildup. For
9 the exact reasoning that you said, we know that
10 there's collective bargaining agreements out there
11 that are going to elevator technician's wages at
12 150 bucks an hour or something like that. But
13 everybody who is bidding on that task order is all
14 going to be using that same minimum.

15 MR. DAGGETT: They have to with that
16 rate.

17 MS. SCHWEER: Right. Whatever the --
18 what the prevailing wages are for that task order.

19 MR. DAGGETT: Okay. Good. Thank you.

20 MR. HARRIS: Eric Harris, EML. We
21 talked about on-ramping and off-ramping. Can you
22 float between both unrestricted and the small

1 because case example, if you apply for the
2 unrestricted, your three year revenue has been
3 above that 38.5, but at some point you're in that
4 five year base period, your three year revenue
5 goes down below that, will you now be ramped or
6 have the ability to now go into the small and bid
7 smalls in the unrestricted? You can always bid
8 unrestricted no matter where you are. And then
9 vice-versa, if you're in a small you apply, you
10 get on the small contract and you are super
11 successful with other business and now you go
12 above that threshold for three year revenue, and
13 now you're considered a large business through
14 Dunns. Now do you ramp-up into the unrestricted
15 or you are no longer can apply for small? Because
16 it's like a matrox sometimes when you're
17 grandfathered in, you get in the contract and
18 depending on what the base is for that you can
19 stay in there, even if your company on paper is
20 considered large, you can still because you're in
21 the base, I can still apply for all the small
22 contracts.

1 MS. SCHWEER: That's correct. So two
2 different things there. Yes, the company --
3 you're a small business, you can apply and
4 potentially get the contract. Separate question.
5 If your company is on the small business set-aside
6 and during -- sometimes during the first five year
7 base for your revenues push you above the 38.5
8 million to where you've been considered other than
9 small, like you said, the five year base period
10 your size is going to change. We would revisit
11 that at the option period and do a size
12 redetermination.

13 MR. HARRIS: Is it going to go the other
14 way too?

15 MS. SCHWEER: Anything from large can go
16 to small? You know, I'm not sure if we addressed
17 that. We have to look at that in terms of -- we
18 have, you know, vertical on-ramp for the small to
19 go to large, I'm not sure if we contemplated it
20 for large going to small or not. We'll have to
21 ask.

22 MS. MCCARTHY: It's not just that

1 context that you're being scheduled, it's your
2 entire amount of business that you're doing.

3 MR. HARRIS: If you're three year
4 revenue goes below --

5 MS. MCCARTHY: I'm sorry, I thought you
6 said the three year amount of money on this
7 particular --

8 MR. HARRIS: No, no. Like you said
9 earlier, your three year revenue goes below the
10 38.5, you can drop back into the small business.

11 MS. SCHWEER: That's a good question.
12 We will take that one back.

13 MR. HARRIS: And if that's the case, we
14 want to be able to bid on all the small stuff too,
15 so I don't know whether -- how that works. If it
16 can go one way, it should be able to go the other
17 way.

18 MS. SCHWEER: Sure. That's a good
19 question. I see Patrick writing it down.

20 MS. MCCARTHY: Amy said that she would
21 check for us too.

22 MR. DURINGO: Mike Duringo. Just for

1 clarification, who generates the task order? Is
2 it the OCO?

3 MS. SCHWEER: Yes.

4 MR. DURINGO: Do you get a transition
5 period? Once your order BMO, right, and they go,
6 they generate the task order, will it be published
7 on your interact or interact and FBO?

8 MS. SCHWEER: So the task order
9 Contracting Officer, we actually can use -- we
10 will -- it will be on E-Buy just like this
11 Schedule Contract is on E-Buy. So they can use
12 E-Buy or they can go out to the website and look
13 at the list of vendors, see who is qualified for
14 the services they're looking for and send it out
15 to all those vendors. So it will be posted on --
16 will it be posted, Teresa?

17 MS. MCCARTHY: I don't think so. I
18 think it goes to E-Buy.

19 MS. SCHWEER: It would be posted on
20 E-Buy, but they -- even if they don't put it on
21 E-Buy, there's a requirement to send it out to all
22 eligible vendors for those services, fair

1 opportunity. It could be any agency.

2 MR. DURINGO: Any agency.

3 MS. SCHWEER: It won't go through our
4 office. Our office will not be placing orders.

5 MR. DURINGO: And my other question is,
6 you mentioned that criteria for awarding the BMO
7 contract will be not LPTA, right? It will be as
8 you mentioned in the slide. Now how does the task
9 going to get -- is there a chance that task order
10 can fall under SPA?

11 MS. SCHWEER: Yeah. It's up to the task
12 order Contracting Officer. They could do -- they
13 can do best value. It could be -- it's up --
14 there's no restriction on that. Okay. Sir.

15 MR. SIMMONS: Russ Simmons with Syneron.
16 A little while ago on the Acquisition Gateway you
17 had a website. I didn't get to write that whole
18 thing down.

19 MS. SCHWEER: Mary mentioned we haven't
20 heard when that will be available to the public.
21 I think I saw a GSA update that said in the coming
22 days, so we're down to days, that's a good sign.

1 MR. MORGAN: Hi. Chris Morgan with Apex
2 Corporation. How many awards do you anticipate
3 for this small business unrestricted? And then
4 the follow-up to an earlier question, do you -- do
5 you ultimately request proposals per zone? Would
6 we then have a certain number of awardees, small
7 business unrestricted per zone?

8 MS. SCHWEER: Yes. So we don't have the
9 numbers of the awards as far as number of awardees
10 for the future zones. In Zone 1 we're projecting
11 ten of the unrestricted and 40 of the small
12 business set-asides. And I believe we posted -- I
13 think that was posted in the solicitation for Zone
14 1, so we will put that out. We don't have those
15 numbers yet for Zones 2 through 6. We will,
16 assuming we do unrestricted and small business
17 set-asides for each of those we will have a
18 separate number of anticipated awards for each of
19 those.

20 MR. MAZZEI: A little background on
21 that. Essentially how the ten and 40 for Zone 1
22 how we determined that, it was based on current

1 small business and unrestricted spend in that area
2 of Zone 1. We wanted to try to make sure we
3 maintained the small business spend, so we could
4 keep it consistent and moving on for this vehicle.

5 MS. SCHWEER: We did some calculations
6 to say, okay, about how many awards do we need to
7 try to keep that same amount of revenue or more
8 going to small businesses in that zone?

9 MR. MAZZEI: So I can imagine probably
10 the same theory would be applied for these other
11 zones.

12 MS. SCHWEER: The only thing to keep in
13 mind is that Zone 1 spend is significantly higher
14 than most of the other zones. I believe it was
15 1.5 or seven million. I don't think the other
16 ones were close to that. So we may be looking at
17 fewer.

18 MR. DAGGETT: Gary Daggett with
19 Ameresco. This zone is going to spread out,
20 northeast and then you got the Midwest, it's all
21 over the place. So if you got these required
22 tasks and you got the plumbing, the HVAC, the

1 elevator work for example, how would that be
2 proposed if we want to go to other locations? I
3 mean we may have done, for example, HVAC in
4 another section of a zone, we never did any
5 elevator, so could you say, well, that would be
6 subcontracted to an elevator company? How would
7 you propose that to GSA? What would you like to
8 see in that kind of -- not that we couldn't do the
9 work, we haven't done that specific task.

10 MS. SCHWEER: What we're looking for is
11 that we recognize some of you may subcontract
12 especially elevator and fire alarm, a lot of that
13 gets subcontracted out. If you have been the
14 prime on a contract before where you subbed that
15 stuff out, you can use that we were the prime, we
16 were responsible for all the services, that's
17 fine. It doesn't have to be in the zone that
18 you're bidding on. If you've never even been the
19 prime on a contract that had elevator services, it
20 may be tough for you to qualify. What we want are
21 companies that are responsible for making sure
22 that work has gotten done. Does that help? I'm

1 not sure if it does.

2 MR. DAGGETT: Yeah. That doesn't
3 necessarily -- in that particular scenario that
4 doesn't mean the company can't perform it, it just
5 hasn't had the opportunity. It could have
6 subcontracted a gazillion different types of
7 trades and all worked for companies except for
8 that one?

9 MR. MAZZEI: Are you referring to a
10 location or a sub -- service type?

11 MR. DAGGETT: A specific service.

12 MS. SCHWEER: Patrick, do you know?

13 MR. MAZZEI: I mean as Janet said, we
14 structure our vehicle so it's highest technically
15 rated with fair and reasonable price. The reason
16 we do that because we want the vendors with the
17 experience, who know how to perform well, know how
18 to do the service. So, unfortunately, I mean if
19 you haven't done elevators before, haven't
20 subcontracted, don't know how to do that, like
21 Janet said, it may not be the tool for you to use
22 there.

1 MS. SCHWEER: You may have to look into
2 -- I mean there's joint ventures. There's a
3 possibility for those kind of things. Look in the
4 solicitation for the details on that to be able to
5 shore up your company in that area.

6 MR. HARRIS: Eric Harris, CML. Kind of
7 like since you're familiar with the schedule, you
8 know how you have 03-FAC and then you have the SIN
9 codes underneath that schedule, with BMO when you
10 said you could submit a proposal where you just
11 have the required services versus the optional
12 services, when the task order comes out, it's kind
13 of like the schedule where they list I want 03
14 FAC, I want SIN code, X, Y & Z. I'm ordering a
15 service and I want like grounds maintenance, throw
16 cemetery in there, janitorial, HVAC and plumbing,
17 you got five different things in there. When you
18 submit your proposal, say, I did it unrestricted,
19 but all I do was check the box for the required
20 and that's all I provided information for is
21 required, since the task order requires a cemetery
22 and all, does that make me not eligible to bid on

1 that, kind of like doing a schedule where if I
2 don't have the SIN Code I can't bid on it?

3 MS. SCHWEER: Correct. So even if you
4 had -- say you qualified for HVAC and the task
5 order asks for HVAC and janitorial and cemetery
6 maintenance, no, you don't get to bid on it. Only
7 the companies that qualify for at least those
8 three will get fair opportunity to bid on it. And
9 you can bid on it, you can submit a proposal,
10 like, well, I don't do cemetery maintenance, but I
11 could. No, if you can't do that at the task-order
12 level. Now you can -- if you don't qualify -- say
13 you qualify for the minimum at the BMO contract
14 level, at some point your company has the
15 experience to add another service, we can modify.
16 Does that answer your question?

17 MR. DAGGETT: Right. I guess at some
18 point in time it would be a matrix problem. Fast
19 forward to when all the awardees are selected,
20 that there will be a matrix built in, Company X
21 checks, so the two services groups, required
22 services and sub-services will be checked, Company

1 X can provided this for you, Company Y can provide
2 only four out of five?

3 MS. SCHWEER: Right. We don't have it
4 in the presentation, but we do say, yes, the
5 matrix is already built to kind of see what it
6 will look like and that will be on the BMO web
7 page.

8 MS. RESNICK: Listening to all this and
9 I'm just confused in one area. It doesn't seem
10 like the procurement tool that would really
11 benefit small business or even working with large
12 businesses. You know, they have a capacity
13 because all of those things have to be in your
14 toolbox, you know, for instance, the HVAC. I
15 don't do cemeteries. It seems like this whole
16 procurement tool, I find it to be like how they
17 are like strategic sourcing on the furniture
18 company. It's all the big boys got those
19 contracts. There's not many small businesses and
20 that's what I find this to be. Is there any
21 evidence or any surveys or research that you can
22 provide for small businesses that this -- this

1 could be a potential sale or, you know, how many
2 sales you're going to have under the small
3 business? I know it's hard to do, but if you have
4 those services, you know, that I'm sure that the
5 agency projects what they need. Okay. Small
6 businesses can't do everything. Kind of, you
7 know, locked into what we do as a specialty
8 company. So where does that benefit a small
9 business where big business can do a lot of
10 different things?

11 MS. SCHWEER: Keep in mind when you have
12 a unrestricted small business set-aside, so it's
13 not a -- use your office supply for example, I
14 mean like direct delivery services, UPS, Fed Ex,
15 there's not a lot of room there for trouble, but
16 we have it structured in order to promote small
17 businesses. We work very close to Amy to make
18 sure that we doing that and the Office of Small
19 Business Utilization, we just talked about the
20 number of awardees. In Zone 1 we are projecting 4
21 small business awards for every 1 unrestricted
22 award. We don't have any research or

1 documentation to show you like numbers. We don't
2 know because it's not a mandatory source, we don't
3 know exactly what agencies will direct towards
4 this, but I can tell you that we do get a lot of
5 questions from agencies. There are small
6 businesses on this because we want to use small
7 businesses.

8 MS. SNODDERLY: I was just going to say,
9 remember each agency has their goal. There's
10 small business goals, there's other socio-economic
11 categories goals, so agencies are looking for
12 small businesses.

13 MS. SCHWEER: This doesn't change the
14 goals. They still have to make the best decision
15 for their agency in meeting their goals.

16 MS. SNODDERLY: Right.

17 MS. SCHWEER: They're still going to
18 continue to do that. If the best choice for them
19 for any given procurement is going to the
20 scheduled vendor for small business or whatever
21 they're looking for, they may go that way.

22 MS. RESNICK: I just find the whole

1 process, it cost money to get 8(a), it cost money
2 -- it's a tangible. The GSA is taking away from
3 your normal business line and so now there's
4 another procurement tool. What is the benefit,
5 that benefit to small business or even large
6 business? I see the theory, I see what you're
7 doing. My background is an accounting. I
8 understand. Narrow it down and you get more
9 people to use it. It's less hands touching, you
10 know, a piece of paper for an ordering materials,
11 services, but at the end of the day, are we going
12 to have feedback from your team saying after two
13 years this isn't doing anything, we're going to go
14 and everybody get hurts and in-between that time
15 because if it doesn't work, what is your game plan
16 on how long are you going to let this go on as a
17 procurement tool before to your understanding it
18 does not work, because it could possibly not work.
19 I mean with all your study, it could be a great
20 thing, but it could not work. What if it hurts
21 small businesses, you know, and that would defeat
22 the purpose of the -- the whole economy is based

1 on small businesses. I've seen it happen in the
2 furniture GSA schedule, they're eliminated that
3 and big companies have it. You know, Staples is
4 one that comes to mind, you know, because small
5 businesses cannot compete with somebody that has a
6 large volume. It's for me only, I don't know if
7 anybody is small business here, but for me I see
8 nothing but a lot of work, which of course, I
9 don't mind. I know it's a procurement tool which
10 I would like, but I don't know that, you know, the
11 benefit would be there. I would like to know. I
12 would like to talk to somebody and say, what's
13 your -- I'd like to know more information. I put
14 this together in December when this first went
15 out, at the beginning of the year. I had my
16 questions here. So now with this coming, it's
17 coming, it's here. I can't look away, I got to
18 start preparing for it. But my question is, is it
19 worth it for me or anyone else to prepare for it
20 when it cost money? All those little steps we
21 have to do in the proposal it's very costly,
22 gathering that information.

1 MS. SNODDERLY: And I understand what
2 you're saying. It has to be a business decision.
3 We cannot make that business decision for you.

4 MS. RESNICK: I know that. But my
5 question is --

6 MS. SNODDERLY: Just keep in mind,
7 though, that part of the reason -- GSA has looked
8 at market share to see if the federal government
9 for the market shares we're getting into the
10 vehicles that we have. We are only getting a
11 small sliver. So then we have to ask the question
12 why? Why are we only getting this with schedules?
13 Well, because there's issues with schedules where
14 they do not meet the needs of the customer
15 agencies. So then we created another -- we
16 created another vehicle. But we're looking at
17 this as to -- again, and I think we talked about
18 this earlier, to help us capture more of this
19 market share. If somebody is using the schedule
20 and it's great for them, wonderful, we're not
21 going to say don't use the schedule anymore, but
22 we've had a lot of agencies come to us and say,

1 you know, the schedules just really aren't working
2 because of this, this, this or this, and so we
3 have kept that in mind as we created the BMO
4 vehicle so that we can meet the needs of those
5 other customer agencies that are not utilizing the
6 schedule.

7 So I mean I understand what you're
8 saying and it has to be a business decision on
9 your end. Maybe you'll say, I'm just going to be
10 in the schedule arena. I already got a schedule
11 contract, maybe it's not worth it, but maybe it
12 is. I can't say whether it is or isn't.

13 MS. RESNICK: To be honest with you it
14 hasn't and I'm going to tell you why and I really
15 want you to take note of this. I go down to
16 Region 5 with a GSA schedule, I go down there and
17 sit in front of GSA personnel and they say I have
18 all these tools. I know this area. I know it
19 well. You know what they say to me? I'm sorry,
20 we're using GSA Schedule 84, we're using -- we
21 have our O&M contractor for the building. Oh, we
22 also IDIQ. So all of my procurement tools cannot

1 be used because of those. Now we're saying
2 there's going to be another one. Do you know what
3 I mean? It does not -- it's not working for me.
4 It's a small business. I'm just saying that, you
5 know, IDIQ contractors, they don't have -- if
6 they're small business, they don't have a
7 subcontractor. I can't even solicit to them. I
8 can't solicit to Schedule 84. They're doing the
9 same work I'm doing, the only difference is I can
10 save the government money on more efficient
11 equipment, but I won't be given that chance
12 because they have deep pockets and they have a
13 Schedule 84 because it's performance based. At
14 the end of the day when everything is hunky-dory
15 they get their money. I don't have that kind of
16 financing, I can't do that, and I want to
17 subcontract with the Schedule 84 under DOE, the
18 ESCO company, guess what? I get the runaround and
19 then nobody knows what the subcontracting plan is.
20 I'm just telling you the frustrations on my part.
21 I would like to follow this through, and I think
22 the results, the same results that I could

1 experience on GSA schedule and under 8(a) and also
2 the WOSB is a big fat nothing. It's cost me a ton
3 of money where I could have just used my resources
4 on something else. I will be making my decision,
5 but because of the person I am, I was raised in
6 the '70s, I feel like the underdog, you're going
7 to hear about it. I'd like to keep in contact
8 with somebody to find out what the results are for
9 this. I just -- I don't see it being a good
10 positive result for small business. I've been out
11 there for a couple years now almost every day
12 trying to get -- and believe you me when I tell
13 you, just because I have these schedules does not
14 mean I expect those things to fall in my lap. I
15 have good technicians, union pipe-fitters,
16 service, plumbing. I run a legitimate company.
17 There's no passthrough, I self-perform. I can get
18 in and do the work. So I come here, and they say,
19 okay -- I thought for example that this was a
20 replacement under the GSA schedule. I'm thinking,
21 well, it's not a bad thing, you're going to get
22 nothing anyway, right, because I'm shutout. They

1 say, no, no. Even with a mentor it doesn't work.
2 I cannot get into the federal building because
3 they have the 8(a) -- not the 8(a), the Schedule
4 84, they have the DOE, and they have, you know,
5 O&M and they IDIQ. They told me point blank, we
6 don't need you because we already have our vehicle
7 tools. So you're telling me you're going to add
8 another one and ask them to use that one. So now,
9 you know, what did I do close my doors? I like to
10 know what the situation is. And there are other
11 people like me that are in the same situation, you
12 know, they're very qualified, they have mentors
13 and they really work the program, but it's not
14 working because the bigger companies are --
15 they're there.

16 MS. SCHWEER: You brought up 84 and DOE,
17 again, those are energy savings performance
18 contracts and different than this those. They
19 have their own set of challenges.

20 MS. RESNICK: That's the work I do. So
21 it's no different, and I have a plumber there or
22 an HVAC guy and Schedule 84 has one, but I don't

1 get a chance because they got the Schedule 84. It
2 just cuts the small business out totally.

3 MS. SCHWEER: I will let you know, Mary
4 said and I said we haven't awarded Zone 1 yet,
5 we're in the process of doing that. We have no
6 really -- we don't have any orders coming through
7 today, so, obviously, we don't have any lessons
8 learned. We will have that after it gets awarded
9 and we have orders coming through. We have
10 reporting that we have to do in terms of savings
11 and small business dollars so we will have more
12 information. We just don't have it yet.

13 MS. RESNICK: So at some point this may
14 not even roll out?

15 MS. SCHWEER: No. We will award Zone 1
16 and we are going forward with Zones 2 through 6,
17 but it's constantly being re-evaluated. We have
18 to do a bundling into consolidation now. We have
19 -- it goes all the way up to the associated
20 administrator and the Office of Small Business
21 Utilization. We have to make our case that we are
22 still allowing opportunities for small businesses.

1 Now whether the agencies go to this vehicle or
2 not, we have no control over that. We can promote
3 it the best we can, but I'm --

4 MS. MCCARTHY: Well, I want to comment.
5 I hear you're frustrated and I'm very concerned
6 with it because we're not here to hurt the small
7 business. We're trying to provide some
8 opportunities. They are different, but I'll give
9 you my name and what we'll do, I'll find someone
10 that can help you entertain your question and
11 hopefully see where this might be a benefit.
12 Obviously if it's not, it's not, but I'm concerned
13 about it as a GSA associate, I'm very concerned
14 that you're having the frustration you are on some
15 of the other areas that we support. So I'm glad
16 to do that. You can send me an e-mail, give me a
17 couple days because I get about, oh, couple
18 hundred a day. I'll get to you. But I'm very
19 sorry you're having that experience and I really
20 am concerned.

21 MS. RESNICK: Thank you so much.

22 MR. SALINO: Bill Salino, Ameresco. You

1 mentioned early on that Zone 1 received feedback
2 that in case it didn't have the certain
3 requirement you can partner. And I think Gary
4 brought that up. So when you say partner, are you
5 thinking of putting that into the subcontractor
6 plan or a joint venture, can you define that?

7 MS. SCHWEER: It would be the
8 subcontractor plan like Gary has never done
9 elevator maintenance before, putting them in the
10 subcontracting plan doesn't tell us that he can
11 qualify for those services. It would have to be
12 something more formal.

13 MR. SALINO: How did you arrive at the
14 required sections?

15 MS. SCHWEER: That was feedback from our
16 commodity team of the -- again, what services they
17 most frequently order together. And the elevator
18 services is an optional service and probably was
19 the most feedback we got in Zone 1 from companies,
20 so if we get feedback on those again, we can
21 possibly change those for future zones, you know,
22 depending on the feedback we get. We have to make

1 sure we have a good contractor pool for our
2 agencies and people that can provide the services.
3 It doesn't do us any good to put something out
4 there and nobody can qualify for it. So give us
5 that feedback.

6 MR. DIGGETT: Gary Diggett from
7 Kroeschell Engineering. One of the challenges
8 that we have with the older facilities contract is
9 ODC. Can you kind of a compare the contract how
10 BMO is going to work to the 03 FAC?

11 MS. SCHWEER: Yes, the 03-FAC other
12 direct costs is very, very challenging. You have
13 to have all that price upfront, you have to have
14 your -- any potential product, you need the price
15 upfront, any others prepareds you might need a
16 price upfront, and it has to be on your Schedule
17 Contract before you can bid them at the task-order
18 level. So we have structured this more like our
19 friends at PBS, Public Building Service, where
20 they have -- there's a threshold for what the
21 other direct costs can be and if you're including
22 that in your bid at the task-order level they may

1 say up to, what is it, 2500, that you guys use, so
2 you're responsible for any other direct costs that
3 may come up up to that point. If it's over that
4 they may say, you know, you can give us -- pick up
5 some of this for us, get estimates for what it
6 will cost. We're trying to make it easier is what
7 we're trying to do, so the things that are priced
8 on your BMO contract, we're handling it like the
9 GSA, Public Building Service, and I think a lot of
10 other agencies will handle it that way. We're
11 trying to make it more flexible.

12 MS. SNODDERLY: And we did ask that
13 question. We asked -- it went out to our
14 commodity team and we talked to them individually
15 and we asked how they handled it and that's why we
16 have come to the determination that we have.

17 MR. MAZZEI: Janet, can I add one thing
18 would you mind? It's was on this gentleman's last
19 comment. So as you guys can see this is Phase II,
20 right, Zone 2 through 6 or -- yes, 2 through 6.
21 This is kind of our second iteration so we really
22 want -- this is why we put a draft out there and

1 not just -- we didn't put the final RFP out. We
2 want your comments back on things that might need
3 to be changed or we might need to look at or
4 whatnot so just keep that in mind.

5 MS. SCHWEER: We might have to look at
6 Zone 1 because maybe you weren't in Zone 1 and
7 you're looking at it for the first time.

8 AUDIENCE MEMBER: You're saying we
9 should put this in a comment, so.

10 MR. MAZZEI: On FBO there's that
11 questionnaire, so please fill that out and send
12 that in and then there's also areas to provide
13 feedback for the actual comment to the
14 solicitation, so send that too.

15 AUDIENCE MEMBER: I mean we do a
16 tremendous amount of O&M services throughout the
17 country and none of them are elevators. I mean we
18 put elevators in our building, but the
19 subcontractors are a different group within that
20 same building, you know what I mean? So it seems
21 silly to me that you would do that and leave other
22 areas. What differences does it make? It's

1 subcontractor to subcontractor.

2 MS. SCHWEER: Some customers said we put
3 those services altogether, some customers say here
4 we don't. We can't make everybody happy at once.
5 We're try to go with the majority and put it in
6 there to give them the -- by automatically
7 including it we're basically saying now you have
8 got to do that separately, do a separate contract.

9 MR. DIGGITT: So there's an option,
10 right?

11 MS. SCHWEER: Yes, we could.

12 AUDIENCE MEMBER: I mean there's
13 contracts that are going to come up and that will
14 only be HVAC, they're not going to have anything
15 else in there and they're not going to require --
16 there's nothing electrical, right? For some
17 reason that's okay, but if you're not capable of
18 doing the elevator, why would you be excluded from
19 all those others? Which by the way it would
20 probably be the majority of the ones you submit.

21 MS. SCHWEER: What we're trying to avoid
22 is having 500 companies who can do HVAC services

1 like you mentioned on the schedule and nobody does
2 anything else. So we're trying to make it --

3 AUDIENCE MEMBER: For sure. You'd have
4 more of an encompassing contract all the way.

5 MS. SCHWEER: Yes.

6 MR. NORTON: My name is Bob Norton. You
7 said that on the website you were going to have a
8 matrix available for your customers on the winners
9 of the services that they can provide. Is that
10 matrix going to be available to the winners of the
11 contracts as well?

12 MS. SCHWEER: It will be public.

13 MS. SNODDERLY: It's on the gsa.gov.
14 Website. There will be a shortcut to that portal
15 where it will be available. Anybody has access to
16 that.

17 MR. NORTON: And then just to clarify,
18 if a customer has the need and they have five
19 services that meet the task order, it would only
20 be sent to those contract holders who could do all
21 five of those services?

22 MS. SCHWEER: Yes.

1 AUDIENCE MEMBER: You were illustrating
2 on one of your slides the zone. How do you arrive
3 to that particular threshold of 500 million in
4 Zone 3 or --

5 MS. SCHWEER: Those are not ceilings,
6 that is the amount of spend that basically all of
7 the federal government has spent on BMO services
8 in that zone for FY-14. Those aren't -- aren't
9 caps or ceilings of any kind. That is just -- I
10 can try to go back to it.

11 MS. SNODDERLY: It's information that we
12 pulled from FPD, which is Federal Procurement
13 Data.

14 MS. SCHWEER: Just to give you an idea
15 how much spend goes to these types of services,
16 Mary mentioned it's a very small percentage of
17 that. The BMO might get a very small percentage.
18 There's just -- what the government is trying to
19 move towards is the strategic sourcing category
20 management system. It's looking at buying more
21 strategically, trying to reduce thousands and
22 thousands of contracts, maybe fewer contracts to

1 try to get better price, continuing to try to get
2 administrative savings through not having to
3 monitor as many contracts. You know, there are
4 several things. Strategic sourcing is meant to do
5 -- it doesn't necessarily mean that in Zone 1 it
6 say 1.8 billion, it doesn't mean that in a year we
7 are going to have 1.8 billion in sales in Zone 1.
8 It would be awesome if we did, probably won't, I'm
9 pretty confident in saying that, but that's just
10 how much the federal government spends and you can
11 see that's higher than most of the other -- or all
12 the others. That's why we started with that.
13 Does that answer your question?

14 AUDIENCE MEMBER: Yes, thank you.

15 MR. SALINO: Bill Salina, Ameresco. How
16 do you arrive at fair, reasonable pricing? How do
17 you get to that point?

18 MS. SCHWEER: So we're going to take
19 those fully burdened rates that are based on that
20 cost typically a rate determination. We're going
21 to look at the other prices that are available in
22 the market and see how you stack up? We're going

1 to see how far away you are from that. You may be
2 higher, you might be lower. I can't give you a
3 number how close you have to be, that's going to
4 depend on all the other prices that we're looking
5 at, but we want it to be reasonable. Now, you
6 know, we might understand if -- I don't know, I
7 can't think of an example. Patrick, do you have
8 anything to add on that one?

9 MR. MAZZEI: We understand that
10 different -- specific categories are varying or
11 whatnot. There's obviously going to be ranges
12 within the different labor categories and whatnot.
13 One area we'll also look at is how do you compare
14 against the other offers, that we -- so it's going
15 to be a combination of different areas, looking at
16 market pricing, maybe possibly looking at
17 schedules, looking at your direct competition on
18 the BMO. So we will take in several areas for
19 consideration.

20 AUDIENCE MEMBER: I mean is there a
21 database? Obviously, we all want to be fair and
22 reasonable. Is there any guides out there that

1 you're looking at that maybe we should be looking
2 at?

3 MS. SCHWEER: I wish there was a
4 database or guide for us to look at. We don't
5 really have -- like Patrick mentioned market
6 prices -- maybe schedule prices, other prices of
7 other offerors. I mentioned data earlier.
8 There's not a government-wide database of hourly
9 prices. That's why we're going to -- that's why
10 we're looking at the fully burdened rates trying
11 to see where everybody stacks up. And seeing, you
12 know, is your pricing four times higher than your
13 nearest competitor? That's probably going to be
14 hard for us to justify as fair and reasonable. We
15 understand that some may be higher and some may be
16 lower. Everybody is different, different profit,
17 different overhead rates and all of that. So I
18 don't have a hard answer for you on that. It's a
19 judgment call.

20 AUDIENCE MEMBER: Thank you.

21 MS. SNODDERLY: Other questions?

22 MR. HARRIS: Eric Harris CML. Do you

1 consider when you go back to the, once the awards
2 are made where you have the five task order of
3 1.25 million within the base year, do you go --

4 MS. SCHWEER: Base five year period.

5 MR. HARRIS: Right. You have to have
6 that minimum or you could potentially start for
7 de-ramping. Could a consideration be made for how
8 many times you step up kind of in the back swing
9 because multiple times you put in the work, you're
10 just not successful sometimes. But I don't want
11 to say penalize, but I've tried like heck five
12 years on the base, I've only won two. They were
13 only worth X amount, but I probably put in 40. I
14 mean could some consideration be given to that
15 that I see if you get on a schedule anyway and you
16 don't do anything, you probably will be
17 off-ramped, but if you have shown the efforts and
18 you can prove that I have submitted 30 proposals
19 and been successful on three in five years, that's
20 just how it goes.

21 MS. SCHWEER: Yeah. I mean the CO has
22 discretion. What we are trying to avoid and we

1 don't promise anything, we're trying -- we want
2 people who are engaged. If you're submitting 40
3 proposals in five years you're pretty engaged in
4 the vehicle. You may or may not be successful in
5 winning the award. We might want a copy of that.
6 Why do you think that was? To kind of explain
7 that. You know, did they tell you that your
8 experience wasn't there? I don't know. You know,
9 that's one of those situations where we expect you
10 to keep in contact with us and we'll -- we don't
11 talk about it on here, but we talk about it in the
12 draft. Like there will be periodic meetings that
13 we'll have with all the successful bidders, you
14 know. That's where we need you to keep in contact
15 with us, saying, we're having this trouble, so
16 we're not getting to your five and all of sudden
17 we say, hey, you haven't had any sales and you
18 say, well, I just haven't been successful. That's
19 something that we kind of need to keep an eye as
20 we go along and we probably would.

21 MR. HARRIS: Right. And I guess a
22 caveat would be the task orders kind of like a

1 matox, since you -- like for Zone 1, once the
2 awardees are made and then the task orders start
3 coming, you got multiple agencies here, is there
4 going to be a set of guidelines or rules that you
5 restrict them to? For example, why should I have
6 to on a task order re-submit past performance and
7 experience? I've already done that. I've crossed
8 that threshold or burden. I've proven myself to
9 you all that I'm capable of doing this work. So
10 we could seriously streamline the process at the
11 task-order level and make your customers happy
12 that I don't have to do a full blown proposal
13 again for every single task order depending on
14 what agency it is. I mean the Navy does things
15 very differently than the Army does and GSA and
16 you have all your -- some are better than others,
17 whatever. But I would think that we could get
18 this down pretty quickly through the task order to
19 just price, maybe some staffing, very simplified
20 technical like that. That we don't have to go
21 through it all. It would save us a lot of time
22 too and put out a better product. Why do we have

1 to keep going down that path? How many times do I
2 have to tell you, yes, I've done HVAC, I've done
3 it on chillers.

4 MS. SCHWEER: That's a good point.

5 MS. MCCARTHY: Some agencies have a
6 requirement in there that you have to have past
7 performance with any task order, whatever, so
8 that's kind of out of our control, but you make a
9 good point. We can market that because look, why
10 are you doing that? They have already proven
11 themselves or they wouldn't have been awarded a
12 contract. So I hear what you're saying, it's
13 agency specific, and it comes up to the Ordering
14 Contracting Officer in a lot cases. We can point
15 out the advantages and the advantages to the
16 industry, shouldn't cost you near as much money.

17 MR. HARRIS: It would save on the
18 evaluation part on their side of the table, it
19 would save them a whole lot of time.

20 MS. MCCARTHY: That's right, it would
21 save them a whole lot of time.

22 MR. HARRIS: 400 pages versus 50.

1 MS. SNODDERLY: And not everybody is
2 trained.

3 MS. SCHWEER: Like Teresa brought up, I
4 can tell you we've talked to some agencies, they
5 may have, you know, in Texas, for example, along
6 the border, they think that if you're -- HVAC
7 maintenance is HVAC maintenance so if they have
8 some plan that's required for the facility because
9 it's on the border, I don't know. Sometimes they
10 think that they need to ask you about your
11 experience in certain areas so that like Teresa
12 said, we can't necessarily -- if you're doing the
13 standard O&M, HVAC, electrical, plumbing, then do
14 you really need to ask for that again? They have
15 the check keepers that cover performance
16 information in the retrieval system. We're going
17 to check a little bit, but to the extent, yes, we
18 can discuss that, only what they need.

19 MR. DURINGO: What if an agency doesn't
20 fall in one of those identifying zones, is there
21 an opportunity to use this? For example, in
22 Colorado there's a huge complex, a lot of new

1 facilities, multi-agencies, how do they get to use
2 this?

3 MS. SCHWEER: Right now it's not --
4 Colorado is not in it. What would happen the
5 contracting office manages the facility, so if
6 it's not there, they can't use it yet. And,
7 again, we're trying to roll it out. Probably is
8 going to cover the whole country eventually.
9 Everybody can use it all at once. So we are
10 looking at -- so you're correct, if you're an
11 agency and you're trying to procure services in
12 Colorado or Montana, it's not available to you
13 yet.

14 MS. SNODDERLY: We again look at spend
15 and we try to roll out the higher spend areas
16 first or where customers told us there were
17 opportunities, you know.

18 MR. DURINGO: So there is room for
19 expansion?

20 MS. SNODDERLY: We're only in Phase 2.
21 We got Phase 3, 4, however many phases we end up
22 with. Okay. Did I see a hand somewhere else?

1 MS. MCCARTHY: It's not only expansion.
2 We went out to the west coast and we were told
3 that maybe California, Nevada is too big. Maybe
4 it's too big. So we got to look at that. And
5 we're going to look at that and see if we need to
6 kind of adjust our sites a little bit in order to
7 make sure that we can get some successful
8 businesses and some successful services.

9 MS. SNODDERLY: Any other questions?
10 I'm going to give you -- go back to the end really
11 quickly here and what this is going to do is give
12 you contact information. Again, our e-mail
13 address, so if you think of something after you've
14 gone back to your office and say oh, I should have
15 asked that question, e-mail it to us. As Patrick
16 said the draft RFPs are still out there. If you
17 have any questions or comments on those if you
18 would let us know on that. Okay. I'm going to
19 ask one last time, any questions? If not, I'm
20 going to turn it over to Teresa.

21 MS. MCCARTHY: Well, I thank you very
22 much for your participation today. I appreciate

1 the candor, the honesty. I appreciate the
2 questions. And you know, if you think of
3 something that's grossly out of whack, let us
4 know. That's what we come to you for. We need
5 your input, we want your input. We don't always
6 have -- a lot of the expertise, that's what you
7 have, you're in the industry, you're doing it,
8 you're marketing it, you're working it, you know
9 what makes money, you know what doesn't make
10 money, you know what makes sense. So this could
11 all change. We need your help. With that I
12 really, really appreciate it, you coming. I know
13 it was a hike for a lot of you. I'm seriously
14 glad it didn't snow for a number of reasons.
15 Please, please, please, respond to the
16 questionnaire. It will help us draft the RFPs.
17 Any question is a good question you know. And I
18 know a lot of times this stuff it's complicated.
19 Again, if you need to go to the Small Business
20 Coordinator, they're the technical agency for
21 small businesses. They will help you. You can
22 reach the team at fssi.bmo@gsa.gov. Obviously, we

1 can't all field personal questions to us. We
2 don't even want to because we want to make sure we
3 have a consistent answer that goes back to
4 everybody, so we may need to get-together to make
5 sure we have good answers. So thank you very much
6 for coming and have a great day, and maybe we will
7 see some of you in Boston.

8 (Whereupon, the PROCEEDINGS were
9 adjourned.)

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1 CERTIFICATE OF NOTARY PUBLIC

2 DISTRICT OF COLUMBIA

3 I, Carleton J. Anderson, III, notary
4 public in and for the District of Columbia, do
5 hereby certify that the forgoing PROCEEDING was
6 duly recorded and thereafter reduced to print
7 under my direction; that said transcript is a true
8 record of the testimony given by witnesses; that I
9 am neither counsel for, related to, nor employed
10 by any of the parties to the action in which this
11 proceeding was called; and, furthermore, that I am
12 not a relative or employee of any attorney or
13 counsel employed by the parties hereto, nor
14 financially or otherwise interested in the outcome
15 of this action.

16
17 (Signature and Seal on File)

18 -----
19 Notary Public, in and for the District of Columbia

20 My Commission Expires: March 31, 2017
21
22

